Submission Management Application

ALL INDUSTRY TEST
USER GUIDE

INSURANCE BUREAU OF CANADA

BUREAU D'ASSURANCE DU CANADA

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Revision History

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This material is intended to provide orientation and guidance to insurers accessing the new Automobile Statistical Plan (ASP) Data Collection and Submission Management systems during the All Industry Test period. Due to ongoing enhancements the depiction of the online applications in this document may not be an exact representation.

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1. INTRODUCTION

1.1. Overview of IBC's new Automobile Submission Management Application

IBC's new Automobile Submission Management Application provides reporting companies with information and tools to help them manage their automobile data submissions. By using the various modules within the application, your company will be better able to monitor and analyze its data submissions, thereby avoiding unnecessary deficiency fees.

The Submission Management application includes access to Submission Analysis, Test Analysis, Error Analysis and Error Correction modules. For the purposes of the All Industry Test, the following two modules will be made available to reporting companies.

- **Submission Analysis**
  - Replaces today's SMART application for automobile (Plans 8 & 9) data submissions only.
  - Summarizes details of data submitted over a three or five year period.
  - Ensures reporting companies' balances are complete and identifies any potential submission anomalies.
  - For more information, please see SUBMISSION ANALYSIS.

- **Error Correction**
  - Replaces today's Auto EEC application for the correction of errors occurring in the 2008 Automobile Statistical Plan.
  - Allows reporting companies to identify and correct automobile errors on-line.
  - For more information, please see ERROR CORRECTION.

The Test Analysis and Error Analysis modules are scheduled for implementation in January 2008.

1.2. Getting Started

Browser Requirements

The Submission Management application is available through IBC's Portal. To access IBC's Portal you must use a browser that supports 128-bit encryption.

The IBC's Portal and the Submission Management application is compatible with Microsoft Internet Explorer 6.0 and greater. Earlier versions of Explorer and other browsers are not supported.

Application Availability

**Availability of the production application is to be included in final release of documentation.

Obtaining Access

**How to obtain access to the production application is to be included in final release of documentation.

Logging In

The Submission Management application for **All Industry Testing** can be accessed via the web address WWW.ASPTEST.IBC.CA. This will bring you to the Portal log-in screen. Log in to the Portal by entering your provided user ID and password, and clicking the LOG ON button. You will be prompted to change your provided password on your first log in attempt.

New passwords must:

- Have a minimum of 7 characters and a maximum of 32
- Contain characters from three of the following four groups:
- Uppercase letters (A, B, C…)
- Lowercase letters (a, b, c…)
- Numerals (1, 2, 3…)
- Symbols (! @, #, $, %, etc.)
- Not be the same as the 5 previous passwords
- Not contain the user's name, User ID, or either of these spelled backwards

Users will be locked out after 3 sign-on attempts with incorrect passwords

(NOTE: To request additional users during All Industry testing please see the **User ID Request Form** by accessing IBC's website WWW.IBC.CA and linking to 2008 Auto Stat Plan from the Data Quality Management site.)

Whale Communications Intelligent Application Gateway - Login Page - Windows Internet Explorer
User Name:
Password:
Language:
English (en-CA)
Log On
Forgot your password?
infosource Portal
The tools of the trade
Please note: This is the All Industry Testing Site for the Automobile Submission Management Application. This is not the Infosource information resource site. Soon, a number of IBC's Web tools, including this system, will be integrated within a new Infosource portal.
Portal Applications
IBC Applications
Quick Links
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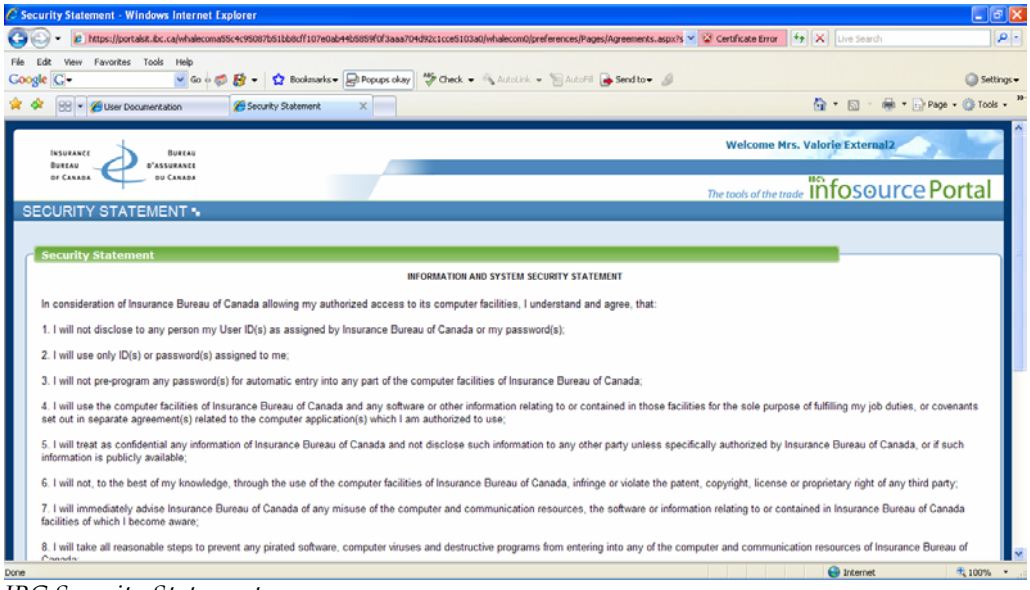
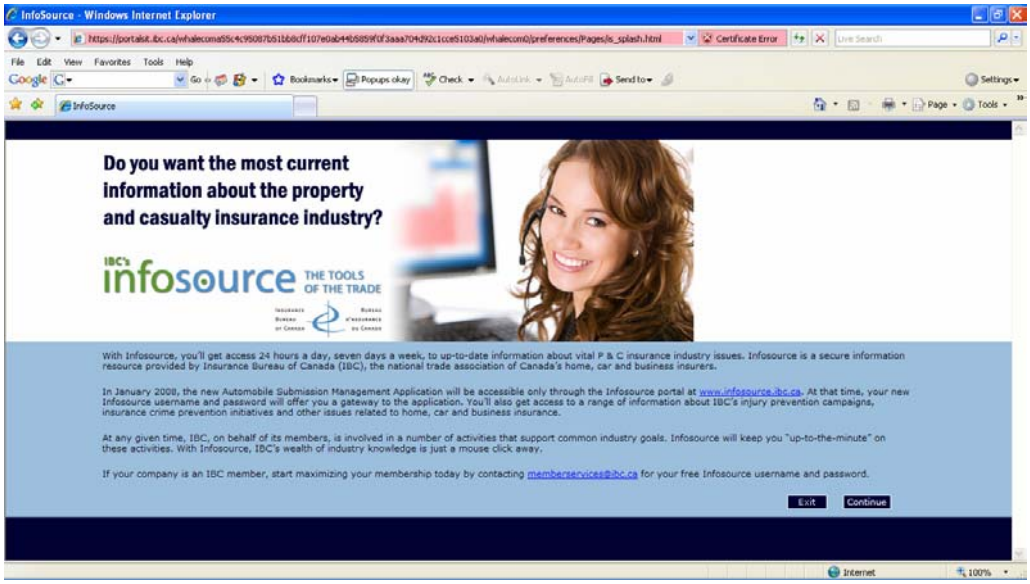
Areas of the Portal Screen

The first time you log in you will be presented with IBC's Security Statement. Please read it careful and click the ACCEPT button to continue to the application.


Security Statement - Windows Internet Explorer
Welcome Mrs. Valorie External2
The tools of the trade infosource Portal
SECURITY STATEMENT
Security Statement
INFORMATION AND SYSTEM SECURITY STATEMENT
In consideration of Insurance Bureau of Canada allowing my authorized access to its computer facilities, I understand and agree, that:
1. I will not disclose to any person my User ID(s) as assigned by Insurance Bureau of Canada or my password(s);
2. I will use only ID(s) or password(s) assigned to me;
3. I will not pre-program any password(s) for automatic entry into any part of the computer facilities of Insurance Bureau of Canada;
4. I will use the computer facilities of Insurance Bureau of Canada and any software or other information relating to or contained in those facilities for the sole purpose of fulfilling my job duties, or covenants set out in separate agreement(s) related to the computer application(s) which I am authorized to use;
5. I will treat as confidential any information of Insurance Bureau of Canada and not disclose such information to any other party unless specifically authorized by Insurance Bureau of Canada, or if such information is publicly available;
6. I will not, to the best of my knowledge, through the use of the computer facilities of Insurance Bureau of Canada, infringe or violate the patent, copyright, license or proprietary right of any third party;
7. I will immediately advise Insurance Bureau of Canada of any misuse of the computer and communication resources, the software or information relating to or contained in Insurance Bureau of Canada facilities of which I become aware;
8. I will take all reasonable steps to prevent any pirated software, computer viruses and destructive programs from entering into any of the computer and communication resources of Insurance Bureau of
IBC Security Statement

During All Industry testing, the Portal splash screen advises users that IBC's Infosource Information Resource Site is not directly available from the Submission Management application during the testing phase. However, Infosource continues to be available from the existing website WWW.INFOSOURCE.IBC.CA.

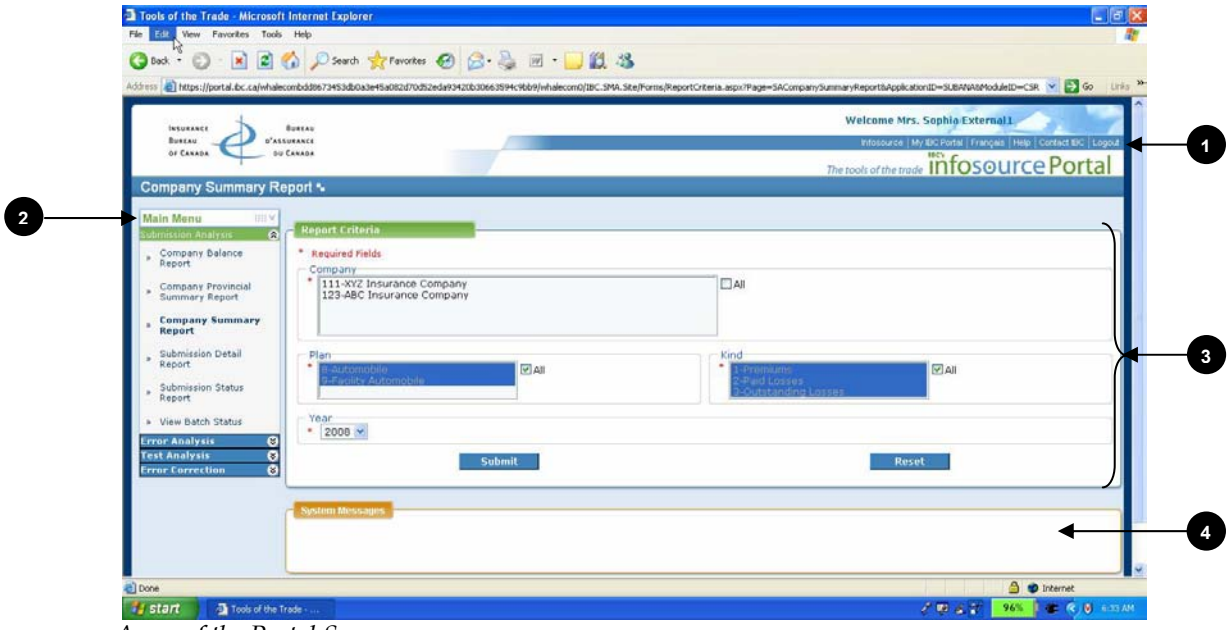
In January 2008, the new production Submission Management application will also be accessed from WWW.INFOSOURCE.IBC.CA.


InfoSource - Windows Internet Explorer
Do you want the most current information about the property and casualty insurance industry?
IBC's infosource THE TOOLS OF THE TRADE
With Infosource, you'll get access 24 hours a day, seven days a week, to up-to-date information about vital P & C insurance industry issues. Infosource is a secure information resource provided by Insurance Bureau of Canada (IBC), the national trade association of Canada's home, car and business insurers.
In January 2008, the new Automobile Submission Management Application will be accessible only through the Infosource portal at www.infosource.ibc.ca. At that time, your new Infosource username and password will offer you a gateway to the application. You'll also get access to a range of information about IBC's injury prevention campaigns, insurance crime prevention initiatives and other issues related to home, car and business insurance.
At any given time, IBC, on behalf of its members, is involved in a number of activities that support common industry goals. Infosource will keep you "up-to-the-minute" on these activities. With Infosource, IBC's wealth of industry knowledge is just a mouse click away.
If your company is an IBC member, start maximizing your membership today by contacting memberservices@ibc.ca for your free Infosource username and password.
Exit
Continue
Portal Splash Screen

1.3. Common Features

Once you have logged in to the Submission Management application, you will note that the screen is segmented into the following areas (the numbers in the table correspond to the numbers in the figure below):

1 Portal Menu	The Portal Menu provides access to general application features. For example, this is where you can select a language preference and change your password.
2 Main Menu	The Main Menu provides access to the modules within the Submission Management application. Your ability to access specific modules is based on your individual user profile.
3 Report Window	The Report Window is the area where you select report criteria and where reports are displayed. (Note that this is not applicable to Error Correction.)
4 Messages Window	The Messages Window is where notices from IBC will be communicated, and where system messages and warnings will be displayed.



Areas of the Portal Screen

Portal Menu

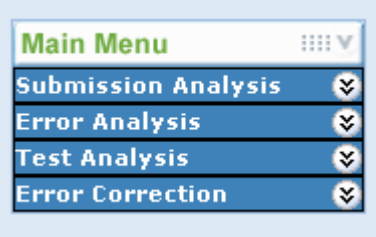
The Portal Menu provides access to general application features. For example, this is where you can select a language preference and change your password.

The Portal Menu also offers a link to IBC's Infosource Information Resource Site which will direct you to the existing website WWW.INFOSOURCE.IBC.CA.

Main Menu

The Main Menu is located in the left portion of the screen. The Main Menu provides access to the modules (e.g., Submission Analysis or Error Correction) within the Submission Management application. Your ability to access specific modules is based on your individual user profile.

To select a report from the Main Menu, expand the modules you wish to use by clicking on the corresponding icon. You will then be able to view all of the available reports and select the report you wish to access.



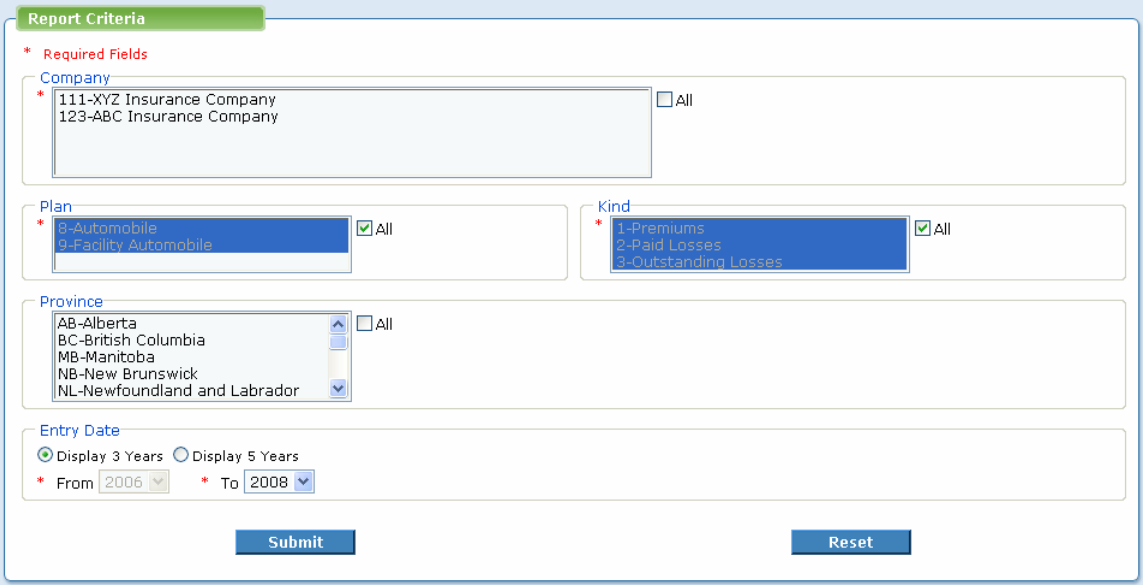
Report Window

The Report Window occupies the main portion of the screen. This is the area where you select report criteria and where reports are displayed. (Note that this is not applicable to Error Correction.)

Report Criteria Screens

There is a custom Report Criteria screen for each report. When you select a report from the Main Menu, the corresponding report criteria will be displayed in a Report Criteria screen.

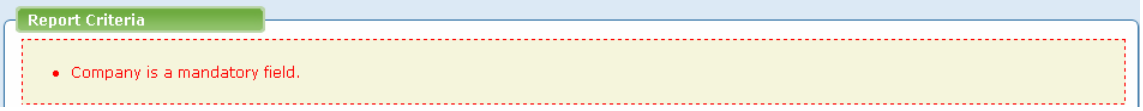
(Note that clicking the RESET button will return the criteria fields to their default values.)



Report Criteria Screen

To generate a report, select the criteria you wish to include in the report and click the SUBMIT button.

The criteria you have specified will be validated when you click the SUBMIT button. Any error messages will be displayed at the top of the Report Criteria screen. If you get an error message, the criteria you selected must be revised and resubmitted. See a sample error message in the figure below.



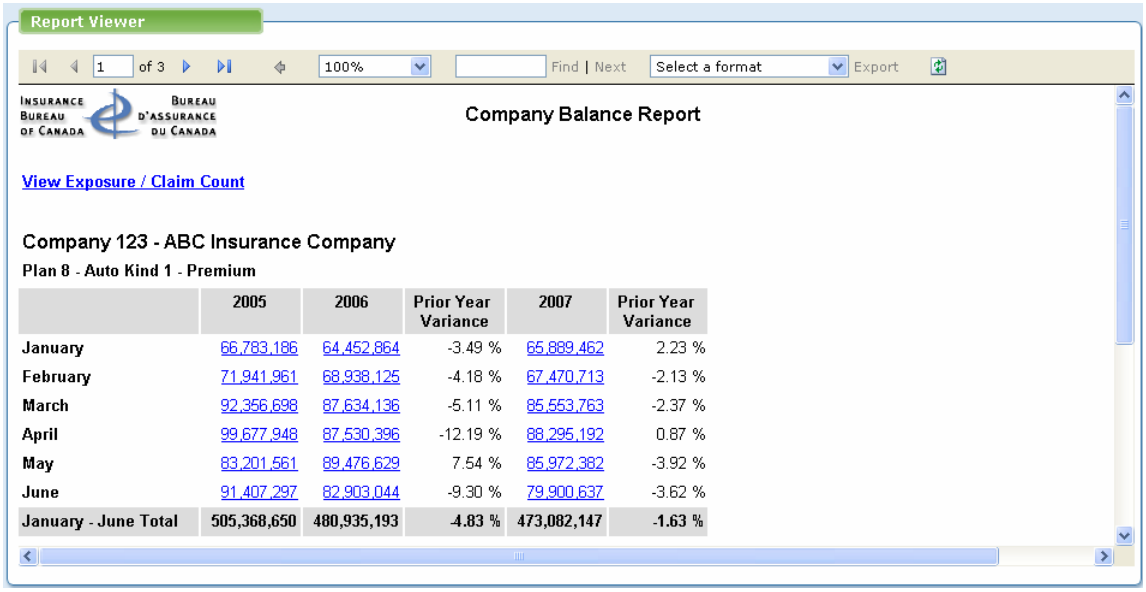
Error Message that Appears at the Top of the Report Criteria Screen

Report Screens

After you submit your selected criteria, the report will be generated based on that criteria and will replace the Report Criteria screen.

The information displayed in some reports also links to more detailed reports. A report that contains links to more detailed reports is known as a "parent report."

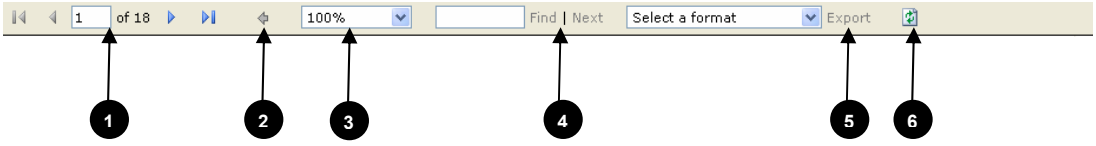
To generate another report, choose the appropriate report name from the Main Menu.



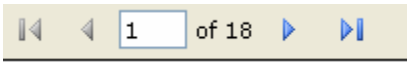
Report Screen

All of the reports have a standard ReportViewer toolbar with the following capabilities (the numbers in the table correspond to the numbers in the figure below):

1. Navigating within a report
2. Navigating back to a parent report
3. Changing the report display
4. Searching within a report
5. Exporting and printing a report
6. Refreshing a report



Navigating within a report

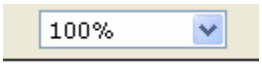


The ReportViewer toolbar (pictured above) includes a variety of page navigation functions. Users can select a specific page or navigate directly to the first or last page of a report. (Page breaks are defined in the report definition and cannot be changed by users.) When navigating multi-page reports, you must use the "back" button on the ReportViewer toolbar to view previous pages. Do not use the "back" button on the Internet Explorer toolbar. If you use the "back" button on the Explorer toolbar, the system will attempt to navigate to a report that is no longer in session. If this occurs, an error message will be displayed.

Navigating back to a parent report

To get back to a parent report, use the button pictured above, located on the ReportViewer toolbar.

Changing the report display



The ReportViewer toolbar provides a standard zoom functionality (pictured above) that lets users zoom in on or out of the report, making the text larger or smaller.

Searching within a report

The ReportViewer toolbar includes a search field (pictured above) to help you find specific text within a report. Search for content in a report by typing a

word or phrase. To search for subsequent occurrences of the same word or phrase, click NEXT.

Note that the search is case-insensitive and begins at the top of the page or section that is currently selected. Wildcards and Boolean search operators are not supported.

Exporting and Printing a report

Exporting

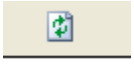
The ReportViewer toolbar also allows you to export reports by selecting an export format and saving the report as a PDF file (see image of export field above). XML export format is also available to support future technology capabilities.

The same report can have a different appearance and functionality depending on the rendering format you select. Depending on how the items in a report are aligned, the report layout in PDF format might include extra pages or white space that were not expected.

Printing

To print a report, export it to a PDF file and then print the report by selecting "Print" from your menu.

Refreshing a report



To refresh a report, click the REFRESH button (pictured above). The report server will then reprocess the report using the most recent data.

2. SUBMISSION ANALYSIS

Submission Analysis Overview

Users can generate the following reports using Submission Analysis:

Company Balance Report (countrywide)
Company Provincial Balance Report
Company Provincial Summary Report (individual company)
Company Group Provincial Report
Company Summary Report (individual company)
Company Group Summary Report
Submission Detail Report
Submission Status Report

These reports present both detailed and summarized information regarding data submitted to IBC by your company. This includes detailed file information, summarized Batch details, and summarized Reporting Unit (RU) details. (A Reporting Unit, or RU, consists of a unique combination of Company, Plan, Kind, and Entry Date.)

After successfully logging into the application, you can access the Submission Analysis reports via the Main Menu. Once you have selected a report, the corresponding report criteria will be displayed.

To view a report, you must follow these steps:

1. Choose a report type.
2. Select the desired criteria.
3. Generate the report.

The next few sections of this user guide will tell you more about the reports you can generate using Submission Analysis.

For information about how to get access to Submission Analysis, please see Obtaining Access.

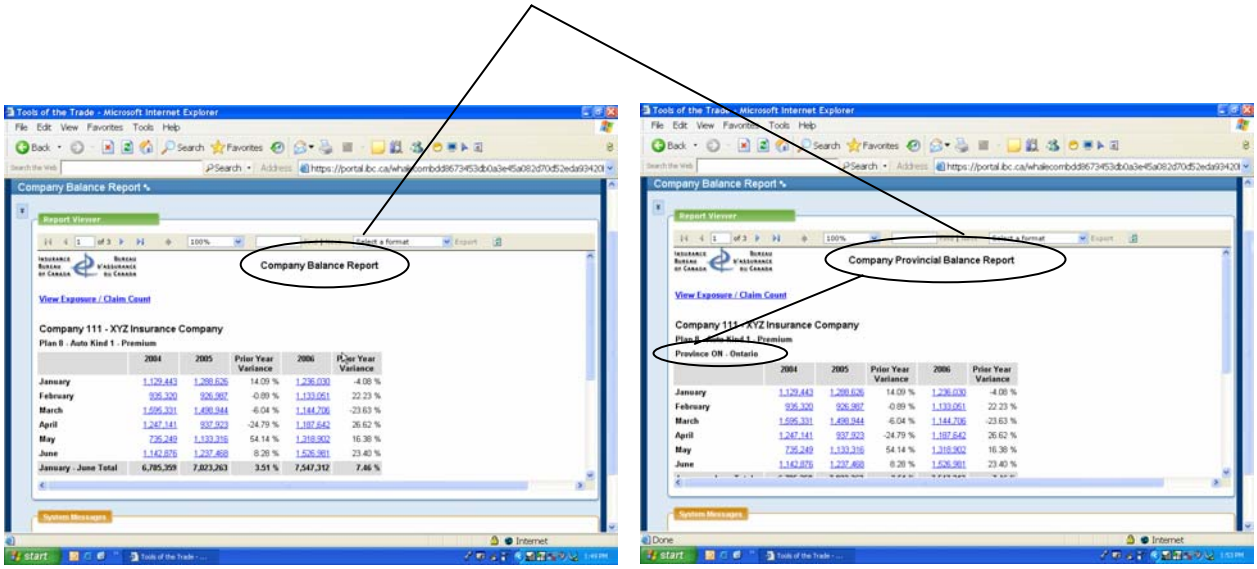
2.1. Company Balance Report (Countrywide or Provincial)

About the Report

The Company Balance Report provides a history of Reporting Unit (RU) balances for a given company, at either countrywide or provincial levels. You may access this report by selecting the Company Balance Report option under Submission Analysis in the Main Menu.

Based on the criteria you specify in the Province field, the Company Balance Report (countrywide) or Company Provincial Balance Report will be displayed.

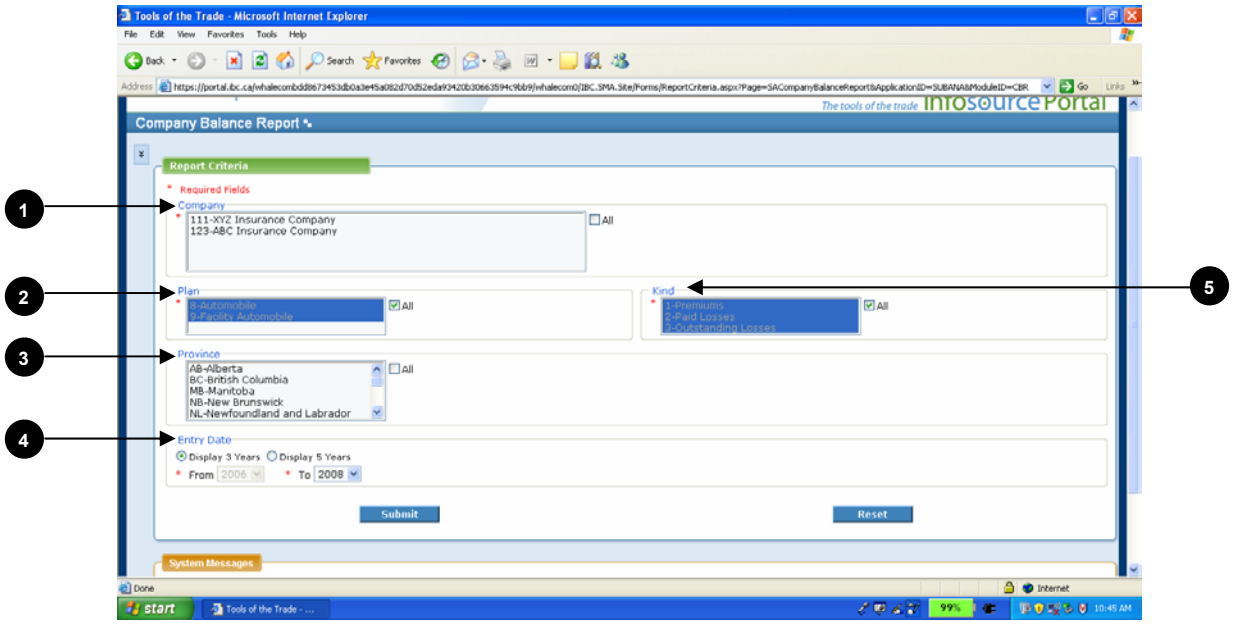
NOTE: *In order to display the Company Balance Report (countrywide), do not select a province. Selecting one or more provinces or by checking the "All" checkbox next to the Company field in the Report Criteria screen will generate a separate Company Provincial Summary Report for each province.*



Company Balance Reports (countrywide and provincial)

Entering Selection Criteria

You can customize the results of the Company Balance Report or the Company Provincial Balance Report by expanding or narrowing the selection criteria and clicking the SUBMIT button. Table 1 describes the criteria and selection options that you find numbered in the screenshot below.



Company Balance Report – Selection Criteria

Table 1: Company Balance Report – Selection Criteria

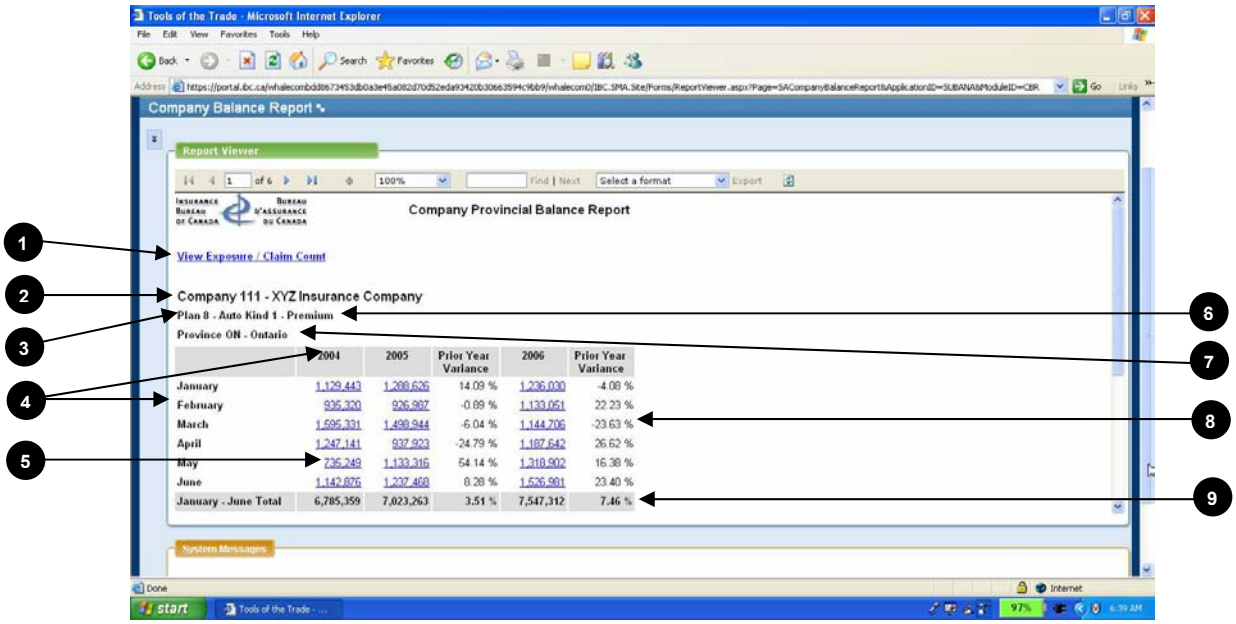
No.	Criteria	Description	Selection options
1	Company (mandatory)	List of available reporting companies based on user's profile	- No default value - At least one Company must be selected - Checking the "All" checkbox will select all companies in the list
2	Plan (mandatory)	List of available Plans	- Defaults to "All" (i.e., the "All" checkbox is checked) - One Plan (or more) can be selected from the list
3	Province	List of Canadian provinces and territories, as well as an "OT-Other" option ("OT-Other" includes any transaction reported with an invalid statistical territory code). If you do not select a province, the report will be summarized at a countrywide level. If you select individual provinces or check the "All" checkbox, the report will be summarized for each individual province.	- Defaults to "All" (i.e., the "All" checkbox is checked) - Selecting one or more provinces, or checking the "All" checkbox, will generate the report for each province individually

No.	Criteria	Description	Selection options
4	Entry Date (mandatory)	"From" and "To" Entry Date years with the option to display a three- or five-year history	- Default is to display the three-year history with the year in the "To" field being the current year - Select the desired "To" Entry Date year and the system will automatically adjust the "From" Entry Date year according to whether you chose to display a three- or five-year history
5	Kind (mandatory)	List of available Kinds	- Defaults to "All" (i.e., the "All" checkbox is checked) - One or more Kinds can be selected from the list

Click the RESET button to return all criteria fields to their default values.

Viewing Report Details – Company Balance Report

After you submit the selection criteria, the Company Balance Report will be displayed. The Company Balance Report shows the monthly submission balances for the period you specified in the Report Criteria screen. Table 2 describes the report content that you find labelled in the screenshot below.


Tools of the Trade - Microsoft Internet Explorer
Company Balance Report
Report Viewer
Company Provincial Balance Report
View Exposure / Claim Count
Company 111 - XYZ Insurance Company
Plan 8 - Auto Kind 1 - Premium
Province ON - Ontario
2004
2005
Prior Year Variance
2006
Prior Year Variance
January 1,129,443 1,288,626 14.09 % 1,236,030 -4.09 %
February 935,320 926,987 -0.89 % 1,133,051 22.23 %
March 1,595,331 1,496,944 -6.04 % 1,144,706 -23.53 %
April 1,247,141 937,923 -24.79 % 1,187,642 26.62 %
May 735,249 1,133,316 54.14 % 1,318,902 16.38 %
June 1,142,875 1,237,468 8.28 % 1,526,981 23.40 %
January - June Total 6,785,359 7,023,263 3.51 % 7,547,312 7.46 %
System Messages
1
2
3
4
5
6
7
8
9

Company Balance Report – Report Details

Table 2: Company Balance Report – Report Details

No.	Content	Description	Links
1	View Exposure/ Claim Count	Link to a report that uses the same criteria as the current report but displays the Exposure/Claim Count totals	Links to the Exposure/Claim Count totals For more information, please see Exposure/Claim Count Report.
2	Company	As selected	Display only

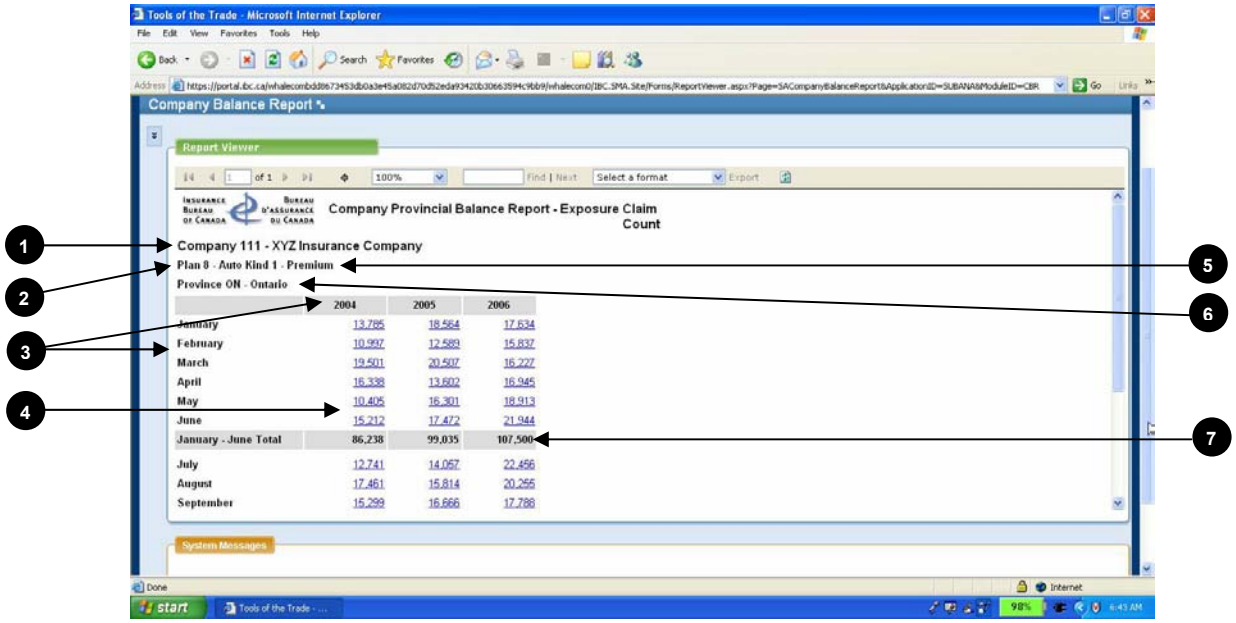
No.	Content	Description	Links
3	Plan	As selected	Display only
4	Entry Date Year and Entry Date Month	As selected (The report heading displays the Entry Date years and the leftmost column of the report displays the Entry Date months)	Display only
5	Dollar Amount	Total dollar amount of the accepted RU Batches on the Company Balance Report (countrywide). Or the total dollar amount for the accepted RU Batch Provinces on the Company Provincial Balance Report	The dollar amount of the Company Balance Report (countrywide) links to the Monthly Submission Detail Report, which displays all of the RU Batches that have been received for the selected RU. For more information, please see Monthly Submission Detail Report. The dollar amount in the Company Provincial Balance Report links to the Reporting Unit Batch Provincial - Detail List, which will display all of the RU Batches that have been received for the selected RU Province. For more information, please see Reporting Unit Batch Province Detail List.
6	Kind	As selected	Display only
7	Province	As selected (This field is only applicable to the provincial report)	Display only

No.	Content	Description	Links
8	Prior Year Variance (%)	Variance (in %) between the balance for the particular Entry Date year/month as compared to balance for the previous Entry Date year/same month.	Display only
9	Semi-annual Totals	Total dollar amount for the 6-month term (January–June total and July–December total)	Display only
	YTD Totals (Year to Date)	Total dollar amount for the 12-month term	Display only

See Also:
Navigating within a report
Navigating back to a parent report
Changing the report display
Searching within a report
Exporting and printing a report
Refreshing a report

Viewing Report Details – Exposure/Claim Count Report

After you select the View Exposure/Claim Count link from the Company Balance Report (or the Company Provincial Balance Report), the Exposure/Claim Count Report will be displayed. The Exposure/Claim Count Report shows the monthly Exposure/Claim Count balances corresponding to the Company, Plan, Kind, Province and Entry Dates that were displayed on the report when you selected the link. Table 3 describes the report content that you find numbered in the screenshot below.



Exposure/Claim Count Report

Table 3: Exposure/Claim Count Report

No.	Content	Description	Links
1	Company	As selected	Display only
2	Plan	As selected	Display only

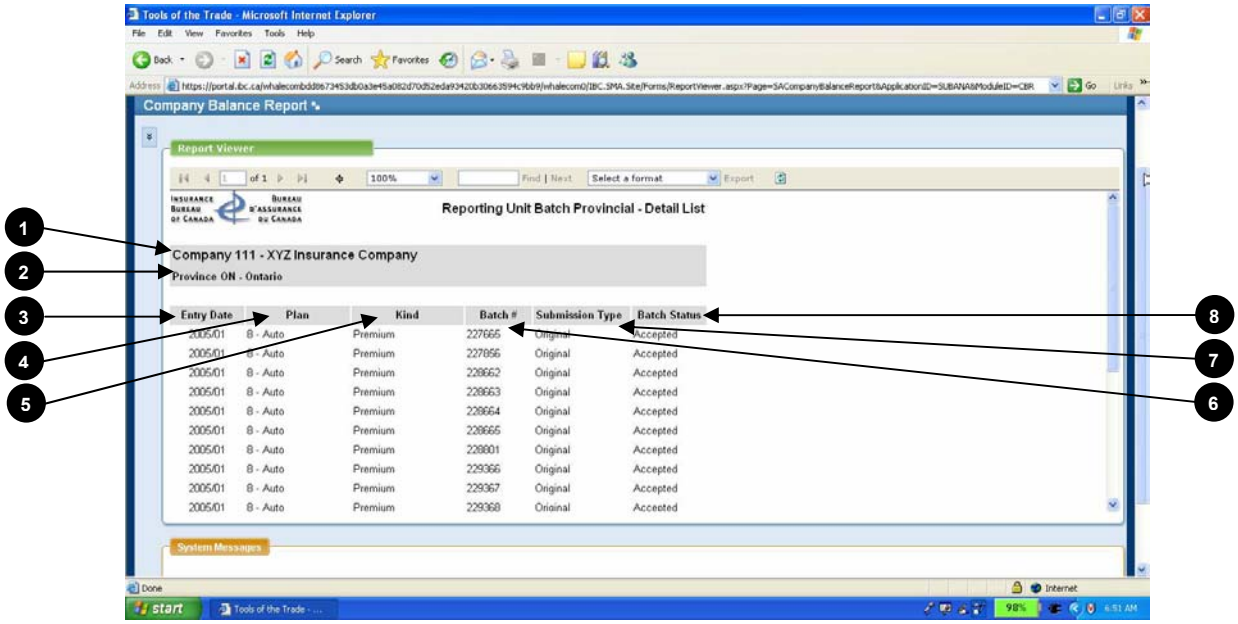
No.	Content	Description	Links
3	Entry Date Year and Entry Date Month	As selected The report heading displays the Entry Date years and the leftmost column of the report displays the Entry Date months	Display only
4	Exposure/ Claim Count	Total Exposure/Claim Count of the accepted RU Batch Provinces for the Company Balance Report (countrywide) or the Company Provincial Balance Report	Display only
5	Kind	As selected	Display only
6	Province	As selected (This is only applicable to the provincial report)	Display only
7	Semi-annual Totals	Total Exposure/Claim Count for the 6-month term (January–June total and July–December total)	Display only
	YTD Totals (Year to Date)	Total Exposure/Claim Count for the 12-month term	Display only

See Also:
Navigating within a report
Navigating back to a parent report
Changing the report display
Searching within a report
Exporting and printing a report
Refreshing a report

Viewing Report Details – Reporting Unit Batch Provincial Detail List

After you select a dollar amount for a specific province from the Company Provincial Balance Report, the Reporting Unit Batch Provincial Detail List will be displayed. The Reporting Unit Batch Provincial Detail List shows all of the RU batches that have been received for the selected province. Table 4, below, describes the report content that you find labelled in the screenshot below.

(NOTE: Selecting a dollar amount from the Company Balance Report (countrywide) will display the Monthly Submission Detail Report.)



Reporting Unit Batch Provincial Detail List

Table 4: Reporting Unit Batch Provincial Detail List Content

No.	Content	Description	Links
1	Company	As selected	Display only
2	Province	As selected	Display only
3	Entry Date	As selected	Display only

No.	Content	Description	Links
4	Plan	As selected	Display only
5	Kind	As selected	Display only
6	Batch #	The unique Batch Number assigned by IBC to the Reporting Unit within the submission file	Display only
7	Submission Type	Type of submission reported by the insurer. Example values are: • **Original** • **Nil**	Display only
8	Batch Status	Current status of the RU batch. Example values are: • **Accepted** • **Reversed**	Display only

See Also:
Navigating within a report
Navigating back to a parent report
Changing the report display
Searching within a report
Exporting and printing a report
Refreshing a report

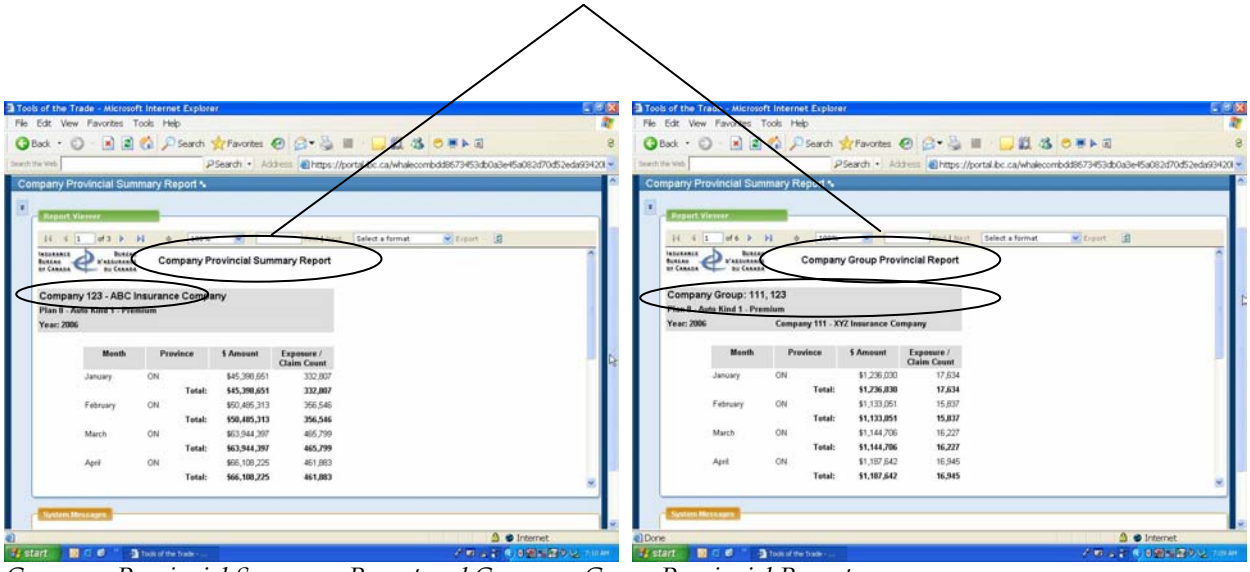
2.2. Company Provincial Summary Report (Individual Company or Group)

About the Report

The Company Provincial Summary Report provides monthly Reporting Unit (RU) Province totals, either for an individual company or for a group of companies. You can access this report by selecting the Company Provincial Summary Report option under Submission Analysis in the Main Menu.

Based on the company information you select, the Company Provincial Summary Report or Company Group Provincial Report will be displayed. The Reporting Company Numbers (RPT) that were selected as part of the company information will be displayed on the header portion of the report.

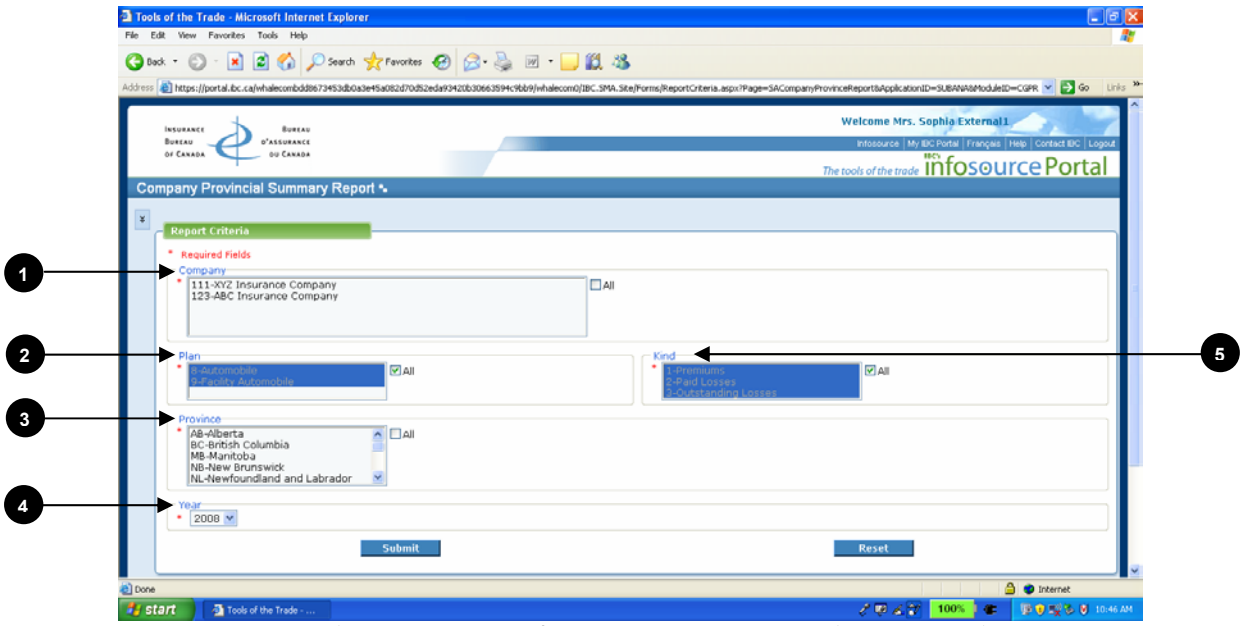
NOTE: *In order to display the Company Group Provincial Report, check the "All" checkbox next to the Company field in the Report Criteria screen. Selecting multiple companies when there is no checkmark in the "All" checkbox will generate a separate report for each company.*


Company Provincial Summary Report
Company 123 - ABC Insurance Company
Company Group Provincial Report
Company Group: 111, 123

Company Provincial Summary Report and Company Group Provincial Report

Entering Selection Criteria

You can customize the Company Provincial Summary Report results by expanding or narrowing the selection criteria and clicking the SUBMIT button. Table 5, below, describes the criteria and selection options that you find labelled in the screenshot below.



Company Provincial Summary Report/Company Group Provincial Report – Selection Criteria

Table 5: Company Provincial Summary Report/Company Group Provincial Report – Selection Criteria

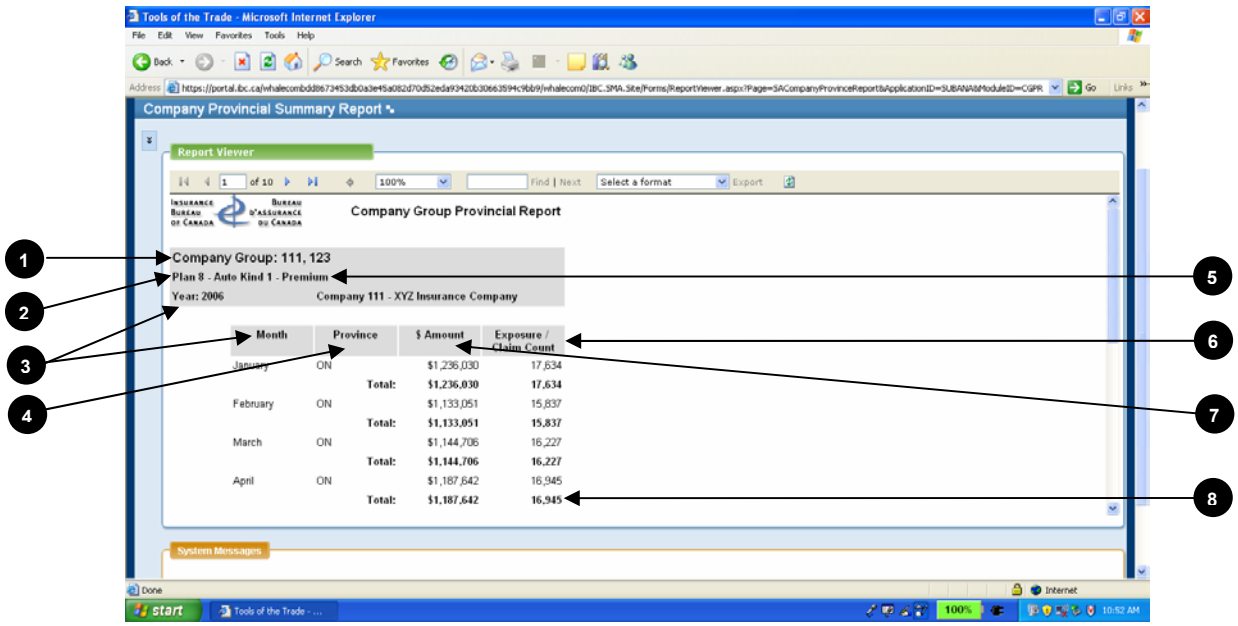
No.	Criteria	Description	Selection options
1	Company (mandatory)	List of available reporting companies based on user's profile NOTE: *In order to display the Company Group Provincial Report, check the "All" checkbox next to the Company field. Selecting multiple companies when there is no checkmark in the "All" checkbox will generate a separate report for each company.*	- No default value - One or more company numbers must be selected - Check the "All" checkbox to select all companies in the list

No.	Criteria	Description	Selection options
2	Plan (mandatory)	List of available Plans	- Defaults to "All" (i.e., the "All" checkbox is checked) - One or more Plans can be selected from the list to the right of the Plans field
3	Province (mandatory)	List of Canadian provinces and territories, as well as an "OT-Other" option that, when selected, includes any transaction reported with an invalid statistical territory code	- No default value - At least one province must be selected. - Check the "All" checkbox to select all provinces in the list
4	Entry Date Year (mandatory)	List of Entry Date years	- Defaults to the current year
5	Kind (mandatory)	List of available Kinds	- Defaults to "All" (i.e., the "All" checkbox is checked) - One or more Kinds can be selected from the list to the right of the Kind field

Click the RESET button to return all criteria fields to their default values.

Viewing Report Details

After you submit your selection criteria, the Company Provincial Summary Report or the Company Group Report will be displayed. These reports show the monthly submission totals for the period you have specified. Table 6 describes the report that you find labelled in the following screenshot.



Company Provincial Summary Report/Company Group Provincial Report –Report Details

Table 6: Company Provincial Summary Report/Company Group Provincial Report – Report Details

No.	Content	Description	Links
1	Company or Company Group	As selected	Display only
2	Plan	As selected	Display only
3	Entry Date Year and Entry Date Month	As selected The Entry Date year is displayed in the report heading. The Entry Date months are displayed in the leftmost column.	Display only
4	Province	As selected	Display only
5	Kind	As selected	Display only
6	Exposure/ Claim Count	Total Exposure/Claim Count of the accepted RU Province	Display only
7	$ Amount	Total dollar amount of the accepted RU Province	Display only
8	Total (Monthly Totals)	Total dollar amount and Exposure/Claim Count for the Entry Date month of the accepted RU Province	Display only

No.	Content	Description	Links
	Grand Total (Year to Date Totals)	Total dollar amount and Exposure/Claim Count for the entire Entry Date year of the accepted RU Province	Display only

See Also:
Navigating within a report
Navigating back to a parent report
Changing the report display
Searching within a report
Exporting and printing a report
Refreshing a report

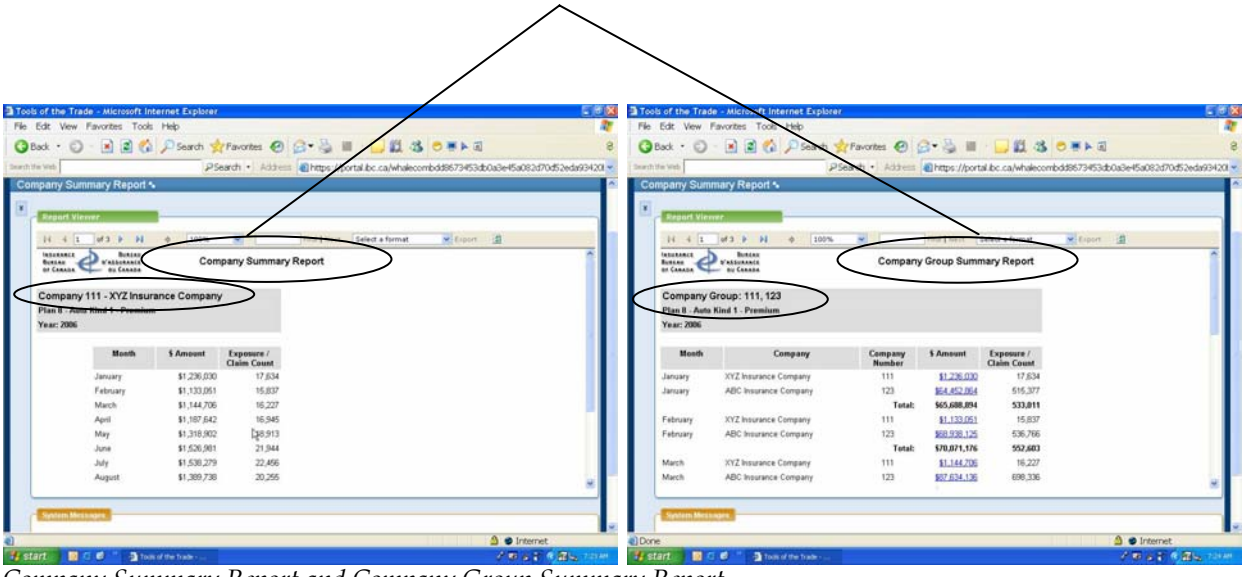
2.3. Company Summary Report (Individual Company or Group)

About the Report

The Company Summary Report provides monthly Reporting Unit (RU) totals for an individual company or a group of companies. You can access this report by selecting the Company Summary Report option under Submission Analysis in the Main Menu.

Based on the company information you select, the Company Summary Report or Company Group Summary Report will be displayed. The Reporting Company Numbers that correspond to the company or group you selected will be displayed in the header portion of the report.

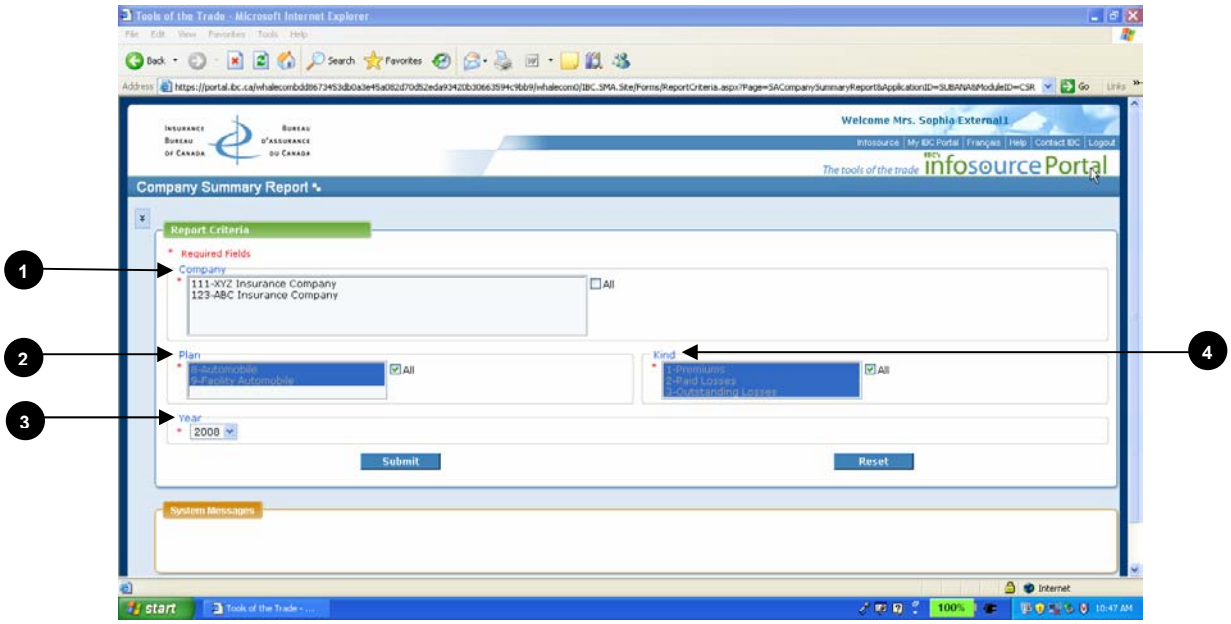
NOTE: *In order to display the Company Group Summary Report, check the "All" checkbox next to the Company field in the Report Criteria screen. Selecting multiple companies when there is no checkmark in the "All" checkbox will generate a separate report for each company.*



Company Summary Report and Company Group Summary Report

Entering Selection Criteria

You can customize the Company Summary Report or Company Group Summary Report by expanding or narrowing the selection criteria and clicking the SUBMIT button. Table 7 describes the criteria and selection options that you find numbered in the screenshot below.



Company Summary Report/Company Group Summary Report - Selection Criteria

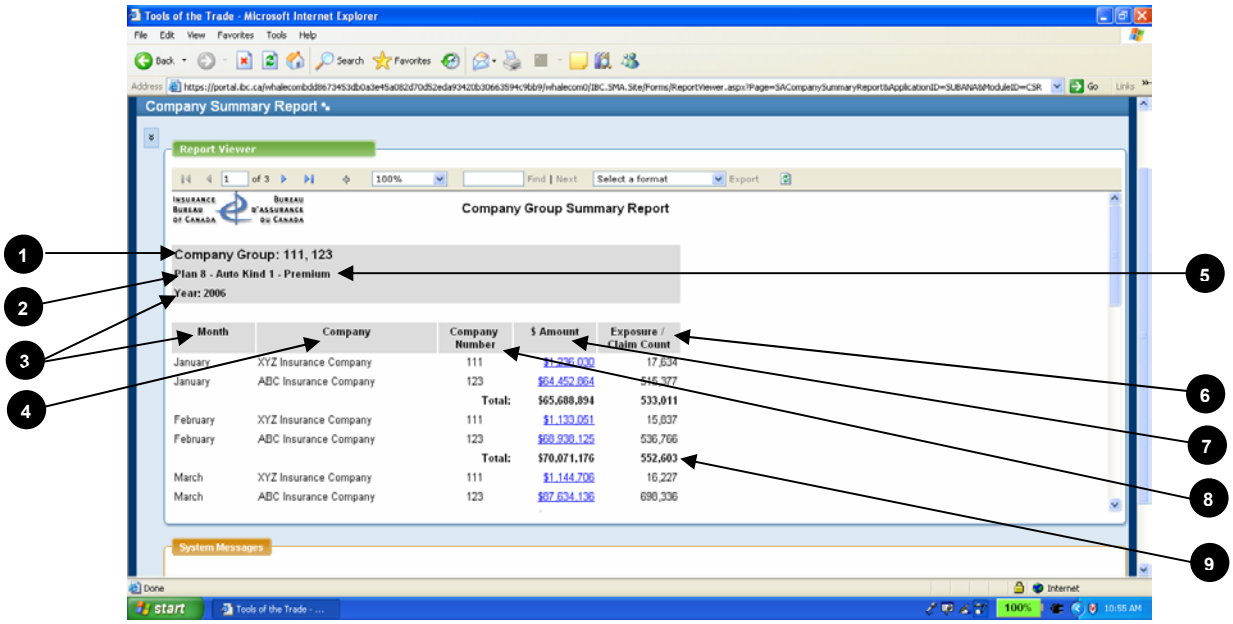
Table 7: Company Summary Report or Company Group Summary Report - Selection Criteria

No.	Criteria	Description	Selection options
1	Company (mandatory)	List of available reporting companies based on user's profile NOTE: *In order to display the Company Group Summary Report, check the "All" checkbox. Selecting multiple companies when there is no checkmark in the "All" checkbox will generate a separate report for each company.*	- No default value - At least one company number must be selected - Check the "All" checkbox to select all companies in the list
2	Plan (mandatory)	List of available Plans	- Defaults to "All" (i.e., the "All" checkbox is checked and all Plans are highlighted) - One or more Plans can be selected from the list to the right of the Plans field
3	Entry Date Year (mandatory)	List of Entry Date years	- Defaults to the current year
4	Kind (mandatory)	List of available Kinds	- Defaults to "All" (i.e., the "All" checkbox is checked and all Kinds are highlighted) - One or more Kinds can be selected from the list to the right of the Kinds field

Click the RESET button to return all criteria fields to their default values.

Viewing Report Details

After you submit the criteria you have selected, the Company Summary Report or the Company Group Summary Report will be displayed. The Company Summary Report and Company Group Summary Report show monthly submission totals for the period you specified in the Report Criteria screen. Table 8 describes the report content that you find numbered in the screenshot below.



Company Summary Report/Group Company Summary Report – Viewing Report Details

Table 8: Company Summary Report/Group Company Summary Report – Viewing Report Details

No.	Content	Description	Links
1	Company or Company Group	As selected	Display only
2	Plan	As selected	Display only

No.	Content	Description	Links
3	Entry Date Year and Entry Date Month	As selected. The report heading displays the Entry Date year. The leftmost column of the report displays the Entry Date months.	Display only
4	Company	Reporting Company name (This is only applicable to the Company Group Summary Report)	Display only
5	Kind	As selected	Display only
6	Exposure/ Claim Count	Total Exposure/Claim Count of the selected RU	Display only
7	$ Amount	Total dollar amount of the accepted RU	The dollar amount links to the Monthly Submission Detail Report, which displays all of the RU Batches that have been received for the selected RU. For more information, please see Monthly Submission Detail Report.
8	Company Number	Unique number that designates a reporting company (This is only applicable to the Company Group Summary Report)	Display only
9	Total (Monthly Totals)	Total dollar amount and Exposure/Claim Count for the Entry Date month of the accepted RU	Display only
	Grand Total (Year to Date Totals)	Total dollar amount and Exposure/Claim Count for the entire Entry Date year of the accepted RU	Display only

See Also:
Navigating within a report
Navigating back to a parent report
Changing the report display
Searching within a report
Exporting and printing a report
Refreshing a report

2.4. Submission Detail Report

About the Report

The Submission Detail Report provides detailed information regarding individual RU Batches. This detailed information includes the Batch Number, the total number of records (Record Count) and the dollar amount, as well as information regarding the error records for a particular RU Batch.

You can use this report to confirm that your data has been successfully transmitted and processed, and to help resolve any problems that IBC has identified with the Balance Report.

You can access this report by selecting the Submission Detail Report option under Submission Analysis in the Main Menu.

Entering Selection Criteria

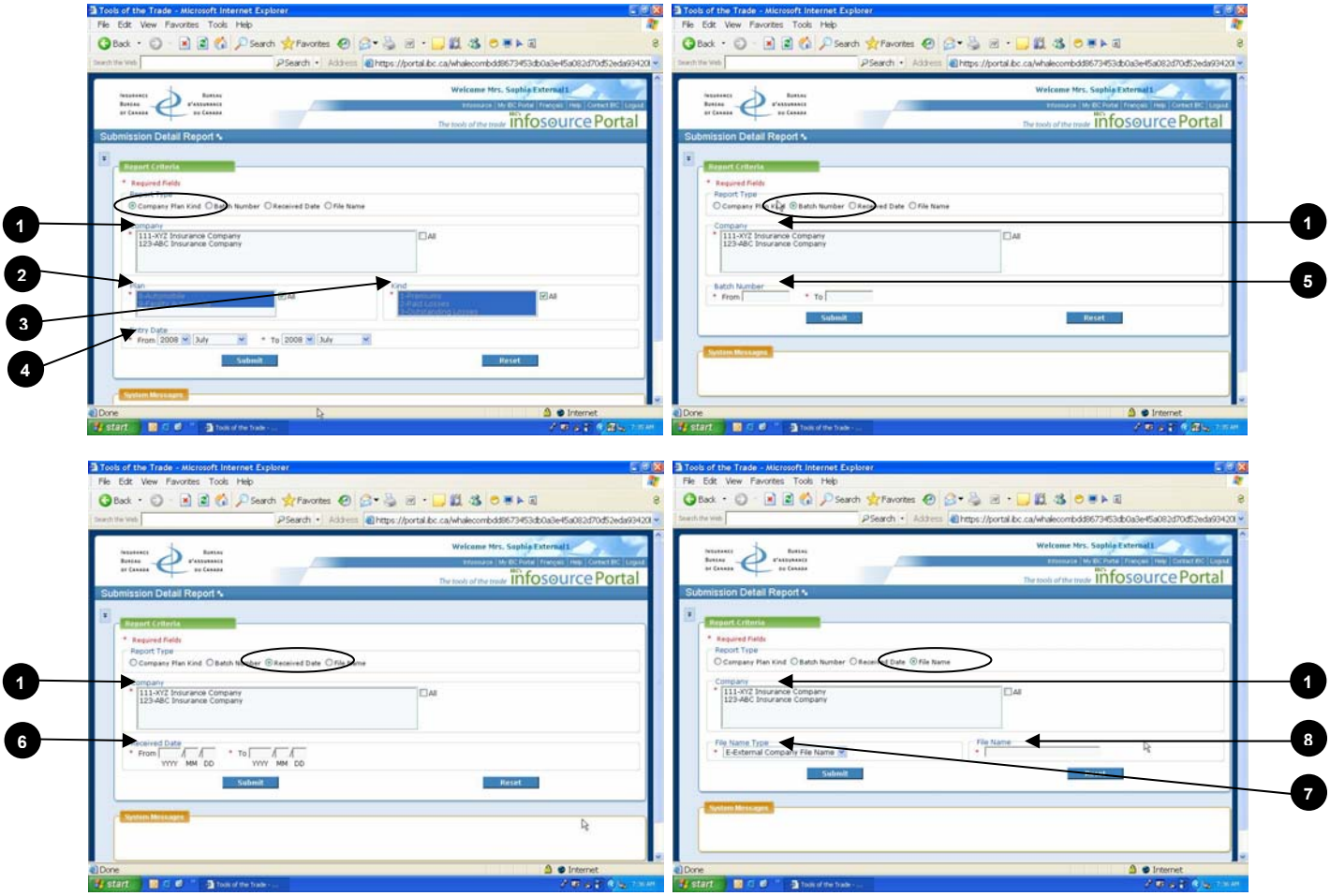
You can customize the Submission Detail Report results by expanding or narrowing the selection criteria and clicking the SUBMIT button.

In the Report Type section near the top of the Report Criteria screen for this report, you must choose from one of four report types. The report type options are:

1. Company Plan Kind
2. Batch Number
3. Received Date
4. File Name

Once you have selected the report type you would like to generate, the corresponding report criteria will be displayed. The screenshots below show the Report Criteria screens for each of the four report types.

Table 9 describes the criteria and selection options that you find numbered in the screenshots below.



Submission Detail Report – Entering Selection Criteria

Table 9: Submission Detail Report – Entering Selection Criteria

No.	Criteria	Description	Selection options
1	Company (mandatory)	List of available reporting companies based on user's profile	- No default value - At least one company number must be selected - Check the "All" checkbox to select all companies in the list
2	Plan (mandatory)	List of available Plans	- Defaults to "All" (i.e., the "All" checkbox is checked and all Plans are highlighted) - One or more Plans can be selected from the list
3	Kind (mandatory)	List of available Kinds	- Defaults to "All" (i.e., the "All" checkbox is checked and all Kinds are highlighted) - One or more Kinds can be selected from the list
4	Entry Date (mandatory)	"From" and "To" Entry Date years and months	- "From" and "To" dates default to the current year and month
5	Batch Number (mandatory)	"From" and "To" Batch Numbers The Batch Number is the unique number IBC assigns to each RU within a file	- No default
6	Received Date (mandatory)	"From" and "To" Received Date year (YYYY) , month (MM), and day (DD) The Received Date refers to the date that the data file was received by IBC from the insurer	- No default - Enter the numeric representation of the year, month and day
7	File Name Type (mandatory)	The only File Name Type option is "E-External Company File Name"	- No option to change from "E-External Company File Name"

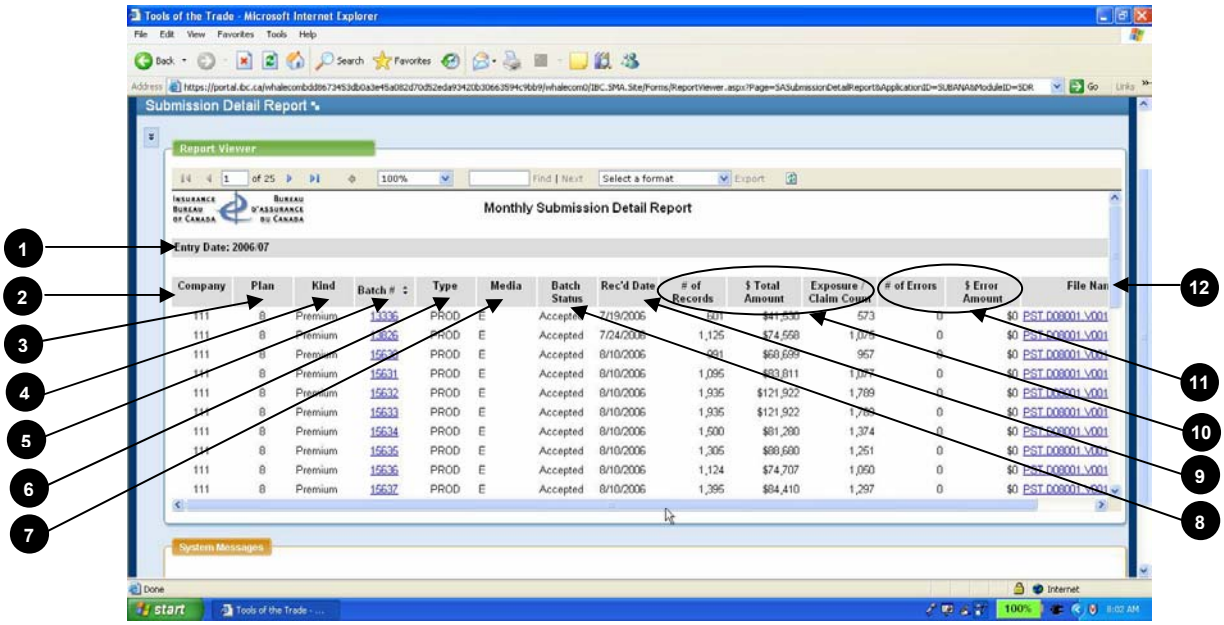
No.	Criteria	Description	Selection options
8	File Name (mandatory)	External Company File Name reported by the insurer	- No default - Enter the full or partial file name - When a partial file name is entered, the report will include all submissions that begin with the file name entered - A minimum of one character must be entered and you cannot use wildcard characters - The search is not case sensitive

Click the RESET button to return all criteria fields to their default values.

Viewing Report Details – Monthly Submission Detail Report

After you submit the criteria you have selected, the Monthly Submission Detail Report will be displayed. The Monthly Submission Detail Report shows all RU Batches that meet your selection criteria. Once you have generated this report, you can click on a Batch Number to view an individual Batch Detail Report.

Table 10 describes the headings you find numbered in the screenshot below.



Monthly Submission Detail Report – Viewing Report Details

Table 10: Monthly Submission Detail Report – Viewing Report Details

No.	Content	Description	Links
1	Entry Date	As selected, if included in the selection criteria	Display only
2	Company	As selected	Display only
3	Plan	As selected, if included in the selection criteria	Display only
4	Kind	As selected, if included in the selection criteria	Display only

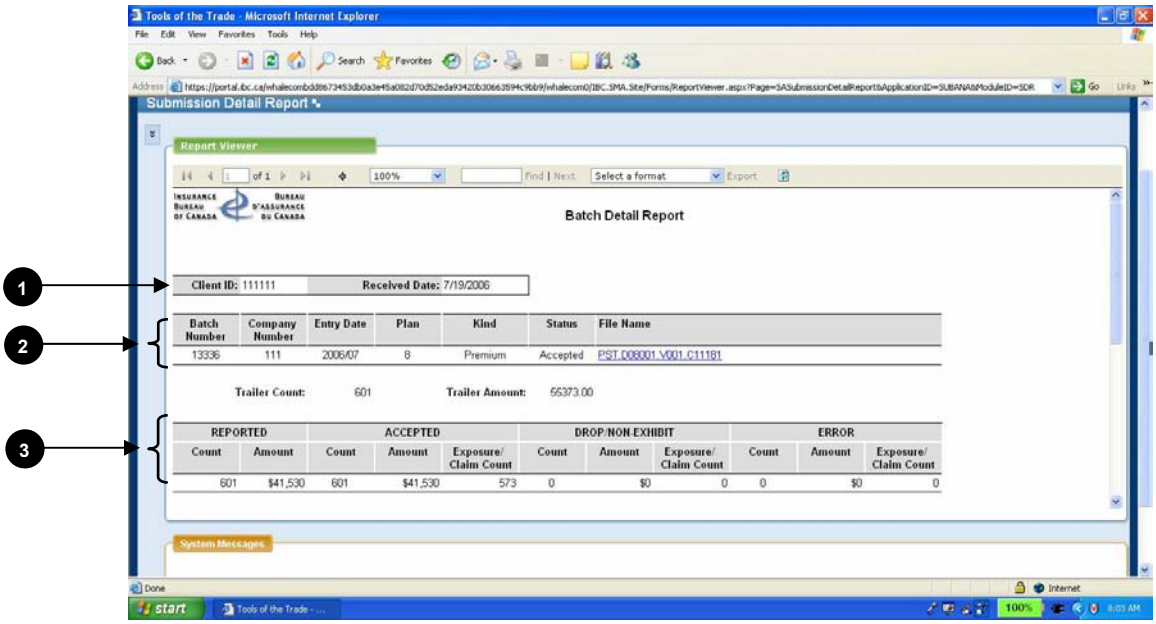
No.	Content	Description	Links
5	Batch #	The unique Batch Number assigned by IBC to the Reporting Unit within the submission file. As selected, if included in the selection criteria.	The Batch Number links to the Batch Detail Report, which will display further details regarding the selected RU Batch. For more information, please see Batch Detail Report.
6	Type	The type of submission reported by the insurer. Example values are: • **Original** • **Nil**	Display only
7	Media	The media type in which the submission file was transmitted to IBC. Example values are: • **Electronic** • **Disk**	Display only
8	Batch Status	The current status of the RU Batch. Example values are: • **Accepted** • **Reversed**	Display only
9	Rec'd Date	The date the data was submitted to IBC by the insurer. As selected, if included in the selection criteria.	Display only
10	# of Records/ $ Total Amount / Exposure/ Claim Count	Total number of records, dollar amount and Exposure/Claim Count for the entire RU Batch	Display only
11	# of Errors/ $ Error Amount	Total number of records in error and dollar amount in error for the RU Batch	Display only

No.	Content	Description	Links
12	File Name	External Company File Name reported by the insurer. As selected, if included in the selection criteria.	The file name links to the Submission Status Detail Report, which will display further details regarding the selected submission file. For more information, please see Submission Status Detail Report.

See Also:
Navigating within a report
Navigating back to a parent report
Changing the report display
Searching within a report
Exporting and printing a report
Refreshing a report

Viewing Report Details – Batch Detail Report

After you click on a Batch Number in the Monthly Submission Detail Report, the Batch Detail Report will be displayed. The Batch Detail Report shows detailed information regarding the RU Batch you have selected. Table 11 describes the report content that you find numbered in the screenshot below.



Monthly Submission Detail Report – Batch Detail Report

Table 11: Monthly Submission Detail Report – Batch Detail Report

No.	Content	Description	Links
1	Client ID	A unique 5-digit organization identifier for the reporting company. If the reporting company is part of a group this is the parent organization identifier.	Display only
	Received Date	The date the insurer submitted the data to IBC	Display only

No.	Content	Description	Links
❷	Batch Number	The unique Batch Number assigned by IBC to the Reporting Unit within the submission file. As selected	Display only
	Company	As selected	Display only
	Entry Date	As selected	Display only
	Plan	As selected	Display only
	Kind	As selected	Display only
	Batch Status	The current status of the RU Batch. Example values are: • **Accepted** • **Reversed**	Display only
	Batch Reject Reason	The reason for the reject status on the RU Batch. Example values are: • **Missing header** • **Out of Balance** (See Appendix B) Or the reason for the hold or deleted status on the RU Batch. Example values are: • **Suspected Duplicate** • **Exceeded Error Tolerance** (See Appendix C)	
	File Name	External Company File Name reported by the insurer	The file name links to the Submission Status Detail Report, which will display further details regarding the selected submission file. For more information, please see Submission Status Detail Report.

No.	Content	Description	Links
❸	REPORTED Count and Amount	Total number of records and dollar amount of all the reported transactions	Display only
	ACCEPTED Count, Amount and Exposure/ Claim Count	The total Record Count, dollar amount and Exposure/Claim Count of all the reported transactions that are found to be error free	Display only
	DROP/NON-EXHIBIT Count, Amount and Exposure/ Claim Count	The total Record Count, dollar amount and Exposure/Claim Count of all the reported transactions that are dropped	Display only
	ERROR Count, Amount and Exposure/ Claim Count	The total Record Count, dollar amount and Exposure/Claim Count of all the reported transactions that are found to be in error	Display only
**	STAT & UITS ERRORS Count, Amount and Exposure/ Claim Count	The total Record Count, dollar amount and Exposure/Claim Count of all the reported transactions that are found to have both STAT and UITS errors	Display only
	STAT ONLY ERRORS Count, Amount and Exposure/ Claim Count	The total Record Count, dollar amount and Exposure/Claim Count of all the reported transactions that are found to have only STAT errors	Display only

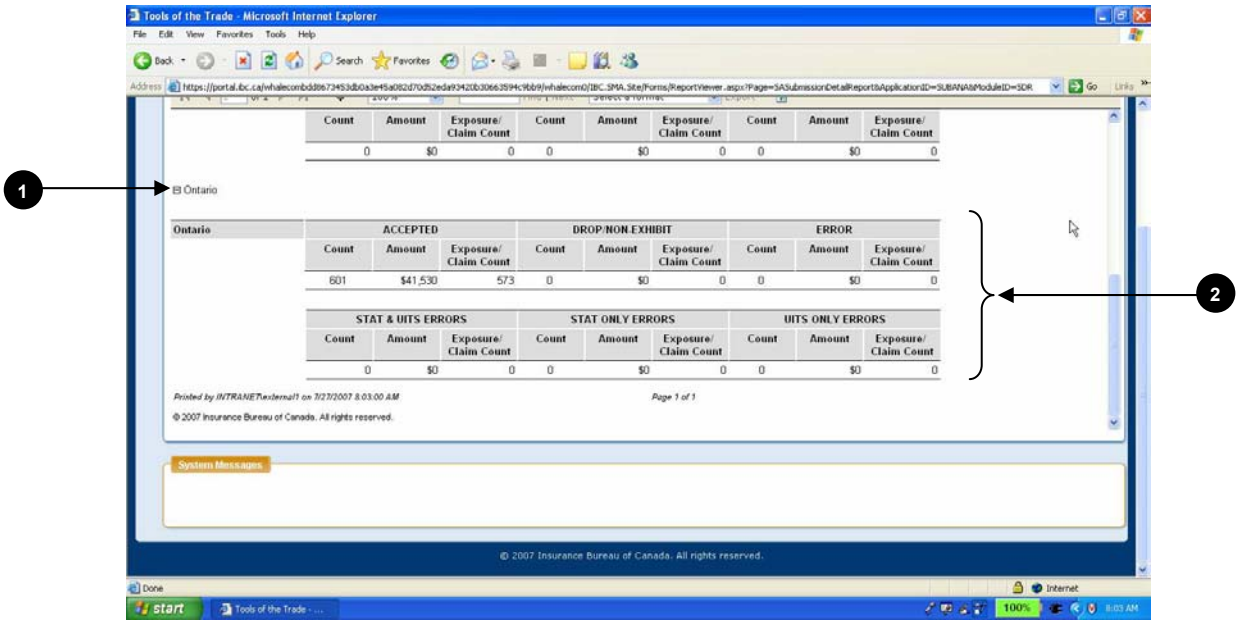
** Not visible on screenshot.

No.	Content	Description	Links
	UITS ONLY ERRORS Count, Amount and Exposure/ Claim Count	The total Record Count, dollar amount and Exposure/Claim Count of all the reported transactions that are found to have only UITS errors	Display only
	Province	A list of the provinces reported within the RU Batch is displayed beneath the RU Batch details	Clicking the icon next to a province will display the detailed information regarding that RU Batch Province. For more information, please see Batch Detail Report by Province.

See Also:
Navigating within a report
Navigating back to a parent report
Changing the report display
Searching within a report
Exporting and printing a report
Refreshing a report

Viewing Report Details – Batch Detail Report by Province

After you click on the icon next to a province in the Batch Detail Report, the Batch Detail Report by Province will be displayed. The Batch Detail Report by Province shows detailed information regarding the RU Batch Province you have selected. Table 12 describes the report content you find numbered in the screenshot below.



Batch Detail Report by Province – Viewing Report Details

Table 12: Batch Detail Report by Province – Viewing Report Details

No.	Content	Description	Links
1	Province	A list of the provinces reported within the RU Batch is displayed beneath the RU Batch details	Clicking the ⊞ icon next to a province will display the detailed information regarding the selected RU Batch Province
2	ACCEPTED Count, Amount and Exposure/ Claim Count	The total Record Count, dollar amount and Exposure/Claim Count of all the reported transactions that are found to be error free	Display only

❷	DROP/NON-EXHIBIT Count, Amount and Exposure/ Claim Count	The total Record Count, dollar amount and Exposure/Claim Count of all the reported transactions that are dropped	Display only
	ERROR Count, Amount and Exposure/ Claim Count	The total Record Count, dollar amount and Exposure/Claim Count of all the reported transactions that are found to be in error	Display only
	STAT & UITS ERRORS Count, Amount and Exposure/ Claim Count	The total Record Count, dollar amount and Exposure/Claim Count of all the reported transactions that are found to have both STAT and UITS errors	Display only
	STAT ONLY ERRORS Count, Amount and Exposure/ Claim Count	The total Record Count, dollar amount and Exposure/Claim Count of all the reported transactions that are found to have only STAT errors	Display only
	UITS ONLY ERRORS Count, Amount and Exposure/ Claim Count	The total Record Count, dollar amount and Exposure/Claim Count of all the reported transactions that are found to have only UITS errors	Display only

See Also:
Navigating within a report
Navigating back to a parent report
Changing the report display
Searching within a report
Exporting and printing a report
Refreshing a report

2.5. Submission Status Report

About the Report

The Submission Status Report provides detailed information regarding individual submission files received by IBC. This detailed information includes the file name and the date the file was received by IBC, as well as information regarding the RUs contained within a particular submission file.

You can use this report to confirm that all of your data submissions have been successfully transmitted and processed, and to help resolve any problems that IBC has identified with the Balance Report.

You can access this report by choosing the Submission Status Report option under Submission Analysis in the Main Menu.

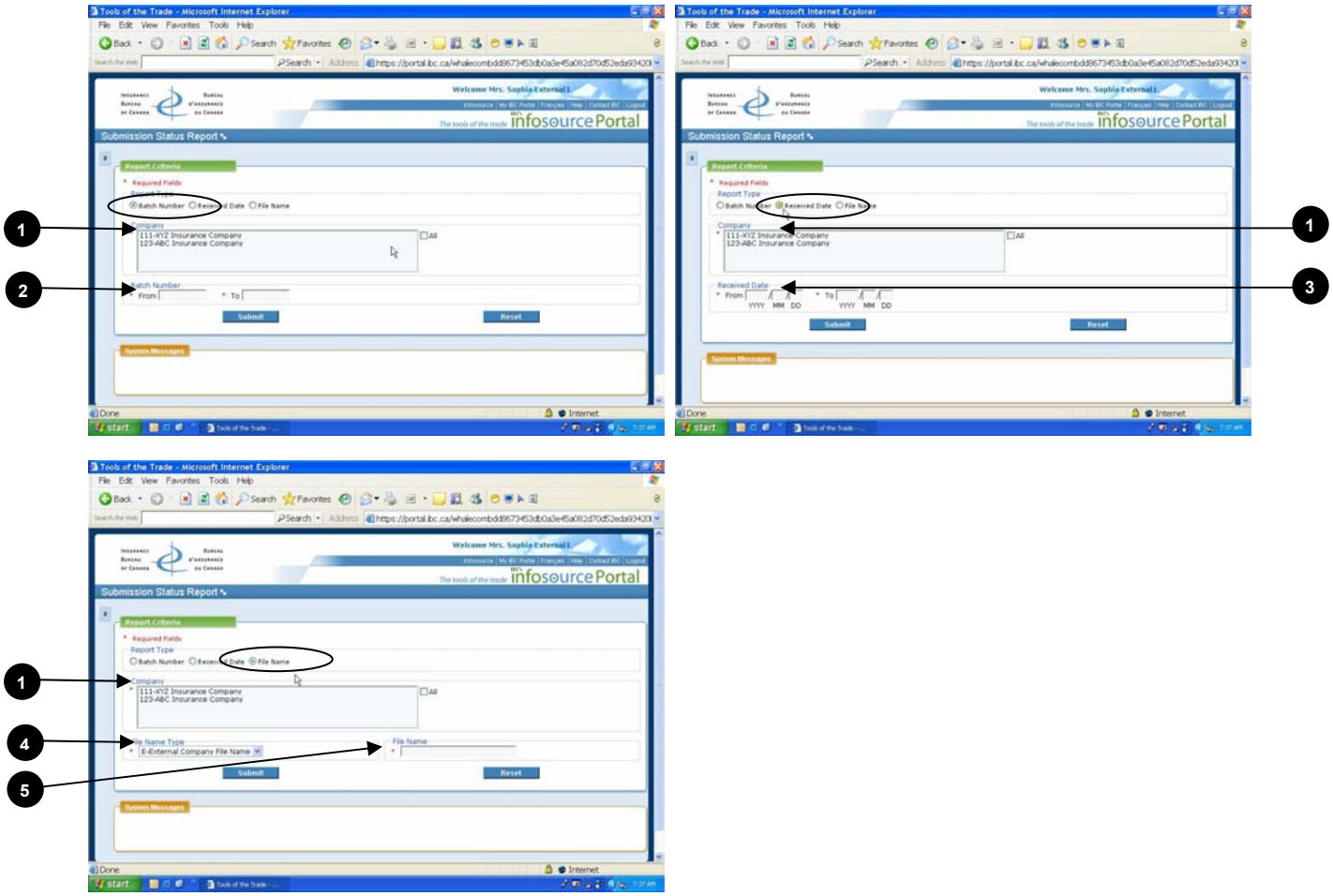
Entering Selection Criteria

The Submission Status Report results can be customized by expanding or narrowing the selection criteria and clicking the SUBMIT button.

The Report Type section of the Submission Status Report criteria screen presents three search options. Once you select the Report Type you wish to generate, the corresponding report criteria will be displayed. The Report Type options are:

1. Batch Number
2. Received Date
3. File Name

Table 13 describes the report criteria and selection options you find numbered in the three screenshots below.



Submission Status Report - Selection Criteria

Table 13: Submission Status Report - Selection Criteria

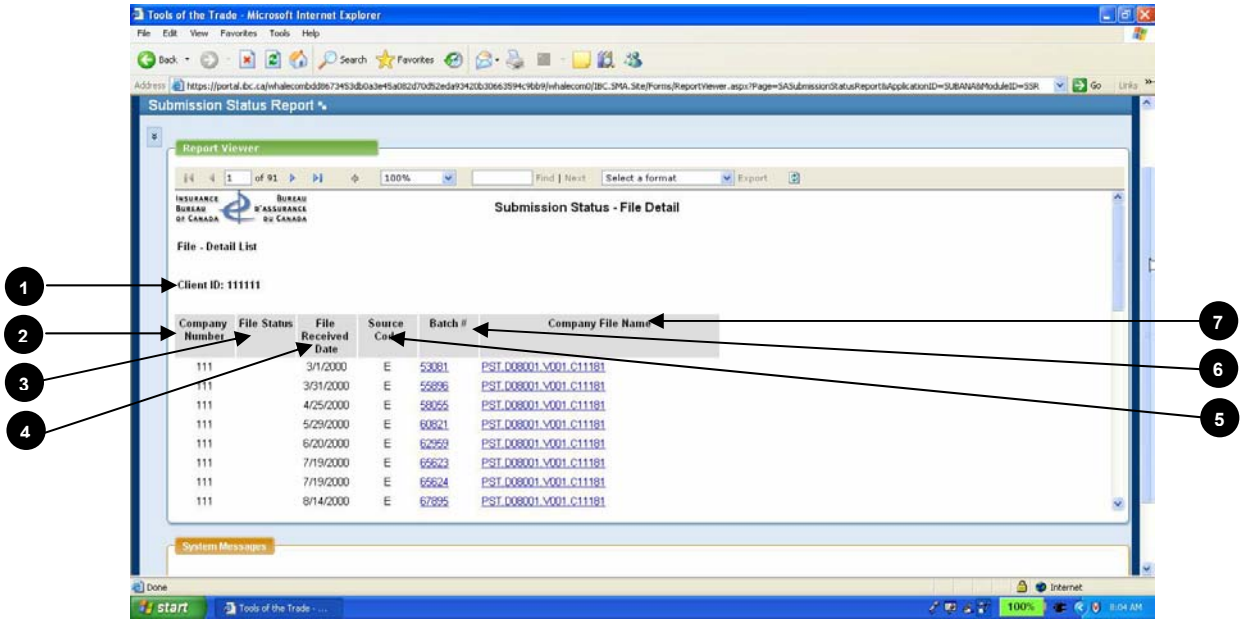
No.	Criteria	Description	Selection options
1	Company (mandatory)	List of available reporting companies based on user's profile	- No default value - One or more company numbers must be selected - Check the "All" checkbox to select all companies in the list
2	Batch Number (mandatory)	"From" and "To" Batch Numbers. The Batch Number refers to the unique number IBC assigned to each RU within a file.	- No default
3	Received Date (mandatory)	"From" and "To" Received Date year (YYYY) , month (MM) and day (DD). The Received Date refers to the date that the data file was received by IBC from the insurer.	- No default - Enter the numeric representation of the year, month and day
4	File Name Type (mandatory)	The only File Name Type option is "E-External Company File Name"	- No option to change from External Company File Name
5	File Name (mandatory)	The corresponding file name for the selected File Name Type	- No default - Enter the full or partial file name - When a partial name is entered, the report will include all submissions that begin with the name entered - A minimum of one character must be entered - There are no wildcard characters - The search is not case sensitive

Click the RESET button to return all criteria fields to their default values.

Viewing Report Details – Submission Status File Detail Report

After you submit the selection criteria, the Submission Status File Detail report will be displayed. The Submission Status File Detail report shows all RU Batches that meet the criteria you selected for the Report Type you specified. From this report, you can click on a Company File Name to link to the Submission Status Report and obtain more detailed information.

Table 14 describes the report content that you find labelled in the screenshot below.



Submission File Status Detail Report – Viewing Report Details

Table 14: Submission File Status Detail Report – Viewing Report Details

No.	Content	Description	Links
1	Client ID	A unique 5-digit organization identifier for the reporting company. If the reporting company is part of a group this is the parent organization identifier.	Display only

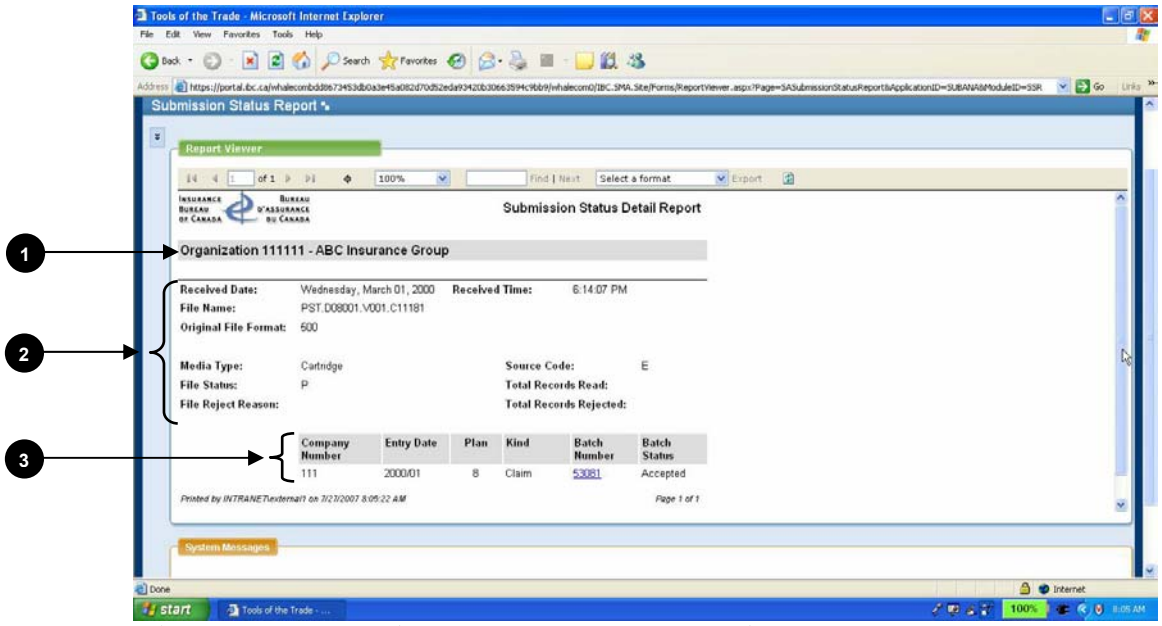
No.	Content	Description	Links
2	Company Number	As selected	Display only
3	File Status	The status of the file The values are: • **Passed** • **Rejected**	Display only
4	File Received Date	Date the data was received by IBC from the insurer	Display only
5	Source Code	The source of the submission file The values are: • **E** (External) • **I** (Internal)	Display only
6	Batch #	The unique Batch Number assigned by IBC to the Reporting Unit within the submission file. As selected, if included in the selection criteria	The Batch Number links to the Batch Detail Report, which will display further details regarding the selected RU Batch. For more information, please see Batch Detail Report.
7	Company File Name	External Company File Name reported by the insurer. As selected, if included in the selection criteria	This file name links to the Submission Status Detail Report, which will display further details regarding the selected submission file. For more information, please see Submission Status Detail Report.

See Also:
Navigating within a report
Navigating back to a parent report
Changing the report display
Searching within a report
Exporting and printing a report
Refreshing a report

Viewing Report Details – Submission Status Detail Report

After you select a Company File Name from the Submission Status File Detail report, the Submission Status Detail Report will be displayed. The Submission Status Detail Report shows detailed information regarding that submission file and its related RU Batches.

Table 15 describes the report content you find numbered in the screenshot below.



Submission Status Detail Report – Viewing Report Details

Table 15: Submission Status Detail Report – Viewing Report Details

No.	Content	Description	Links
1	Organization	A unique 5-digit organization identifier for the reporting company. If the reporting company is part of a group this is the parent organization identifier.	Display only

No.	Content	Description	Links
❷	Received Date/ Received Time	The date and time that the data was submitted to IBC by the insurer	Display only
	File Name	External Company File Name reported by the insurer	Display only
	Original File Format	The original format in which the insurer submitted the data. The values are: • **500** (old auto format) • **600** (new auto format)	Display only
	Media Type	The type of media the company used to transmit the submission file to IBC. Example values are: • **Electronic** • **Disk**	Display only
	Source Code	The source of the submission file. The values are: • **E** (External) • **I** (Internal)	Display only
	File Status	The status of the file. The values are: • **P** (Passed) • **R** (Rejected)	Display only
	Total Records Read	Total number of records within the RU Batch	Display only
	File Reject Reason	The reason for rejection, when the File Status is "Rejected." Example values are: • **Invalid File Name** • **Empty File** (See Appendix A)	Display only
	Total Records Rejected	Total number of records that have been rejected within a file because the record type is unknown	Display only

No.	Content	Description	Links
3	Company/ Entry Date/ Plan/ Kind	List of Reporting Units contained in the submission file	Display only
	Batch Number	The unique Batch Number assigned by IBC to the Reporting Unit within the submission file	The Batch Number links to the Batch Detail Report, which will display further details regarding the selected RU Batch. For more information, please see Batch Detail Report.
	Batch Status	The current status of the RU Batch. Example values are: • **Accepted** • **Reversed**	Display only

See Also:
Navigating within a report
Navigating back to a parent report
Changing the report display
Searching within a report
Exporting and printing a report
Refreshing a report

2.6. Out of Tolerance Report

**Out of Tolerance Report is to be included in final release of application and documentation.

2.7. View Batch Status

About the Report

The View Batch Status option gives you access to the Submission Batch Status List. This list provides detailed information regarding submission files received by IBC, including the current status of these submission files. Other details provided by the Submission Batch Status List include the RU Batch and the date it was received by IBC, as well as information regarding the total number of records in the batch and the total dollar amount for each batch.

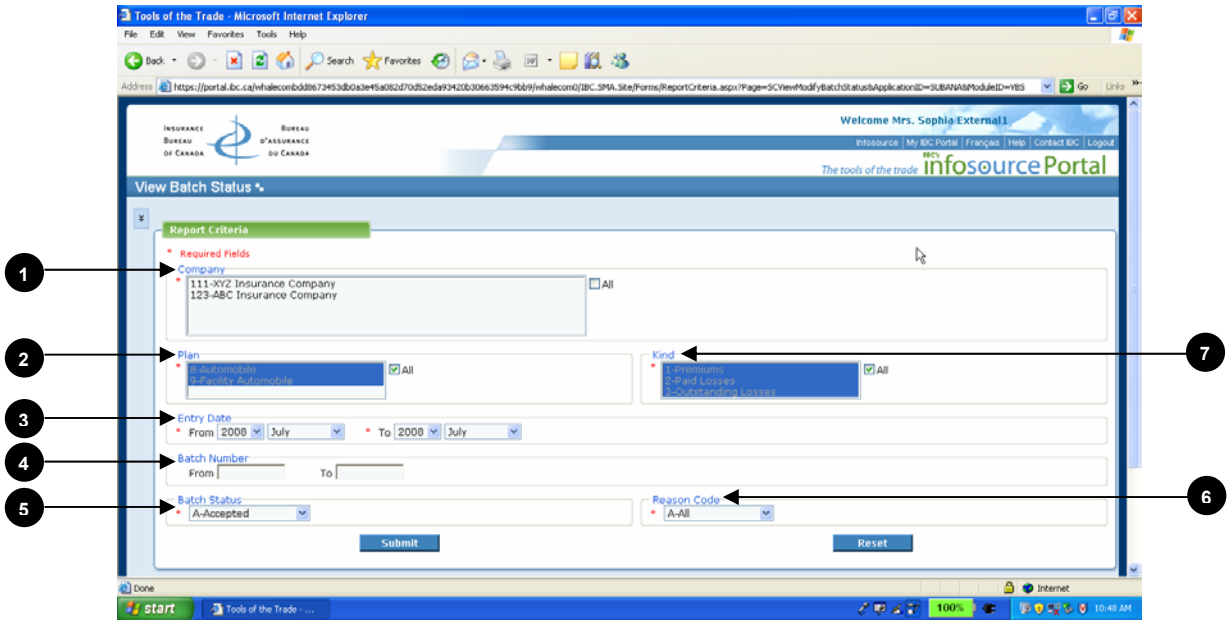
Use this report to confirm the status of RU Batches.

You can access the Submission Batch Status List via the View Batch Status option under Submission Analysis in the Main Menu.

Entering Selection Criteria

You can customize the Submission Batch Status List results by expanding or narrowing the selection criteria and clicking the SUBMIT button.

Table 16 describes the report criteria and selection options that you find numbered in the screenshot below.



View Batch Status – Selection Criteria

Table 16: View Batch Status – Selection Criteria

No.	Criteria	Description	Selection options
1	Company (mandatory)	List of available reporting companies, based on your profile	- No default value - At least one company number must be selected - Check the "All" checkbox to select all companies in the list

No.	Criteria	Description	Selection options
2	Plan (mandatory)	List of available Plans	- Defaults to "All" (i.e., the "All" checkbox is checked) - One or more Plans can be selected from the list
3	Entry Date (mandatory)	"From" and "To" Entry Date years and months	- Default setting for the "From" date is January 2001. - Default setting for the "To" date is the current year and month
4	Batch Number	"From" and "To" Batch Numbers. A Batch Number is a unique number IBC assigns to each Reporting Unit within a submission file	- No default
5	Batch Status (mandatory)	List of possible Batch Statuses	- Defaults to "A-All"
6	Reason Code (mandatory)	List of possible Reason Codes that explain the given status of a batch	- Defaults to "A-All"
7	Kind (mandatory)	List of available Kinds	- Defaults to "All" (i.e., the "All" checkbox is checked) - One or more Kinds can be selected from the list

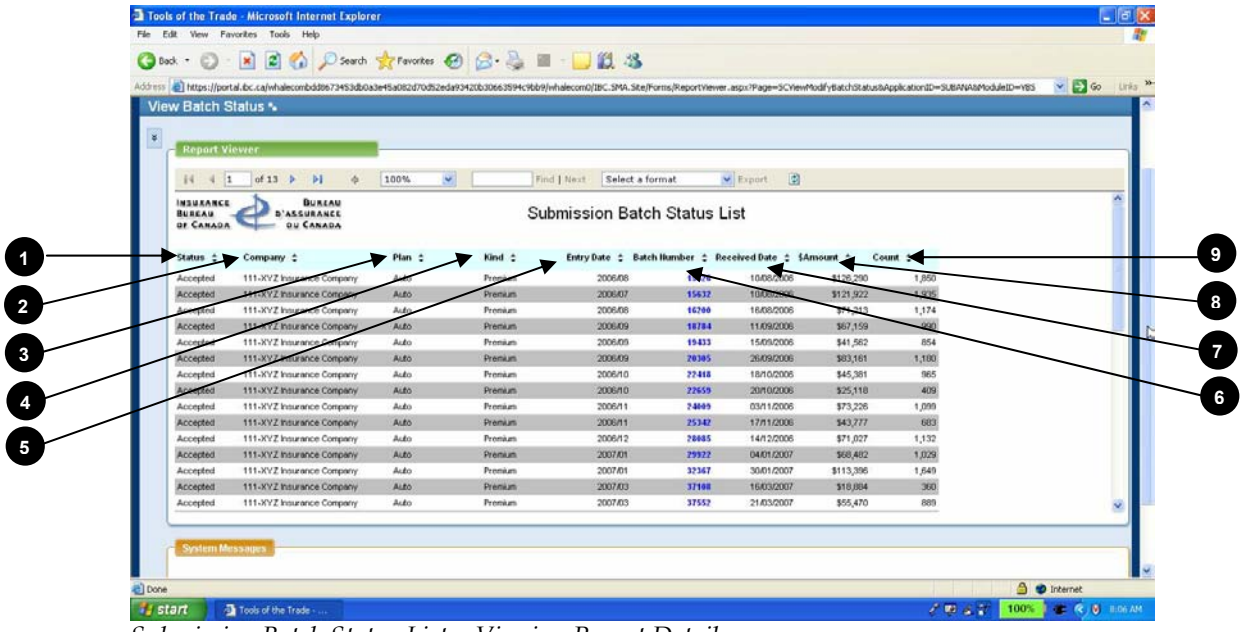
Click the RESET button to return all criteria fields to their default values.

Viewing Report Details – Submission Batch Status List

After you submit the criteria you have chosen, the Submission Batch Status List will be displayed. The Submission Batch Status List shows all RU Batches that meet your selection criteria and allows you to click on a Batch Number and link to the Submission Batch Status Detail report. (Note: If the status of the RU Batch Status is "Hold" and the Reason Code is "Suspected Duplicate," the Suspected Duplicates report is displayed instead of the Submission Batch Status Detail Report.)

You can sort all columns of the Submission Batch Status List report in ascending or descending order by clicking on the icon next to each column heading. To reset the sort order, return to the View Batch Status Report Criteria screen and resubmit your original criteria.

Table 17 describes the report content that you find numbered in the screenshot below.



Submission Batch Status List – Viewing Report Details

Table 17: Submission Batch Status List – Viewing Report Details

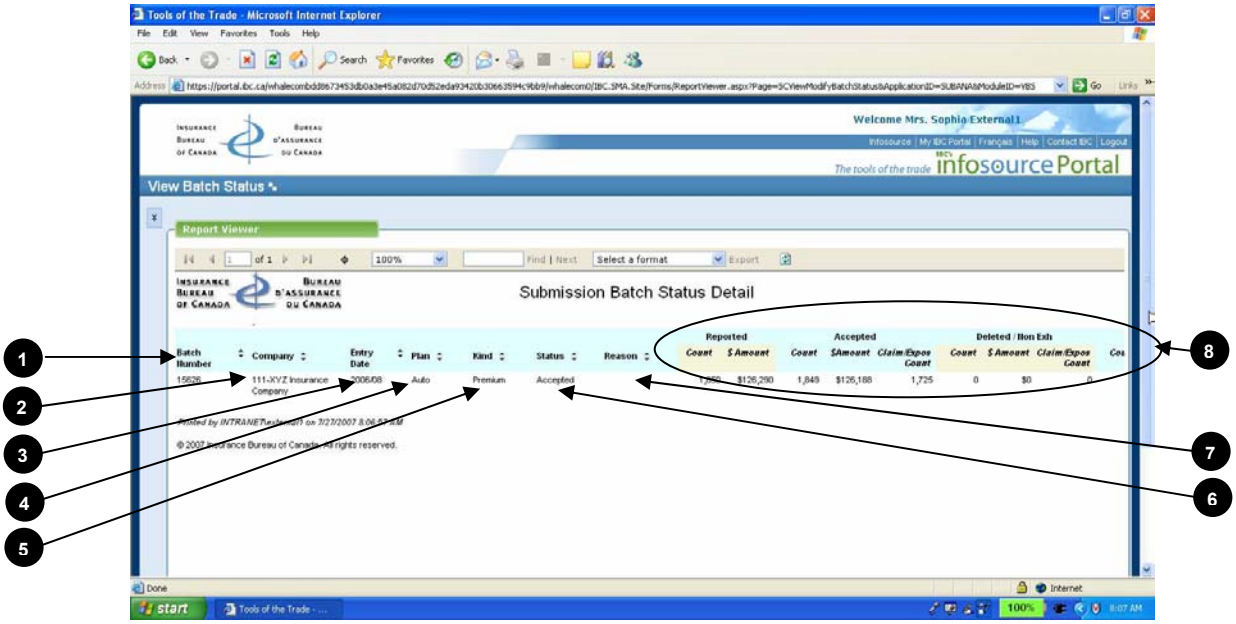
No.	Content	Description	Links
1	Status	The current status of the RU Batch as assigned by IBC. As selected	Display only
2	Company	As selected	Display only
3	Plan	As selected	Display only
4	Kind	As selected	Display only
5	Entry Date	As selected	Display only
6	Batch Number	The unique Batch Number assigned by IBC to the Reporting Unit within the submission file. As selected, if included in the selection criteria	The Batch Number links to the Submission Batch Status Detail report, which will display further details regarding the RU Batch you have selected. For more information, please see Submission Batch Status Detail. *EXCEPTION:* **When the Status is "Hold" and the Reason is "Suspected Duplicate,"** the Batch Number links to the Suspected Duplicate Report, which will display further details regarding the RU Batch you have selected. For more information, please see Suspected Duplicates.
7	Received Date	The date that the data was submitted to IBC by the insurer	Display only
8	$Amount	Total dollar amount of the RU Batch	Display only
9	Count	Total number of records within the RU Batch	Display only

See Also:
Navigating within a report
Navigating back to a parent report
Changing the report display
Searching within a report
Exporting and printing a report
Refreshing a report

Viewing Report Details – Submission Batch Status Detail Report

After you select a Batch Number from the Submission Batch Status List, and the status of that batch is something other than "Hold" with a Reason of "Suspected Duplicate," the Submission Batch Status Detail report will be displayed. The Submission Batch Status Detail report shows further information regarding the RU Batch you have selected.

Table 18 describes the report content that you find numbered in the screenshot below.



Submission Batch Status Detail Report – Viewing Report Details

Table 18: Submission Batch Status Detail Report – Viewing Report Details

No.	Content	Description	Links
1	Batch Number	The unique Batch Number assigned by IBC to the Reporting Unit within the submission file. As selected	Display only
2	Company	As selected	Display only

No.	Content	Description	Links
3	Entry Date	As selected	Display only
4	Plan	As selected	Display only
5	Kind	As selected	Display only
6	Status	The current status of the RU Batch. Example values are: • **Accepted** • **Hold**	Display only
7	Reason	The Reason Code that explains the current status of the batch. Example values are: • **Duplicate** • **Error Threshold**	Display only
8	REPORTED Count and Amount	Total Record Count and dollar amount of all the reported transactions	Display only
	ACCEPTED Count, Amount and Exposure/ Claim Count	Total Record Count, dollar amount and Exposure/Claim Count of all the reported transactions that are found to be error free	Display only
	DELETED/ NON-EXHIBIT Count, Amount and Exposure/ Claim Count	Total Record Count, dollar amount and Exposure/Claim Count of all the reported transactions that are dropped	Display only
	ERROR Count, Amount and Exposure/ Claim Count	Total Record Count, dollar amount and Exposure/Claim Count of all the reported transactions that are found to be in error	Display only

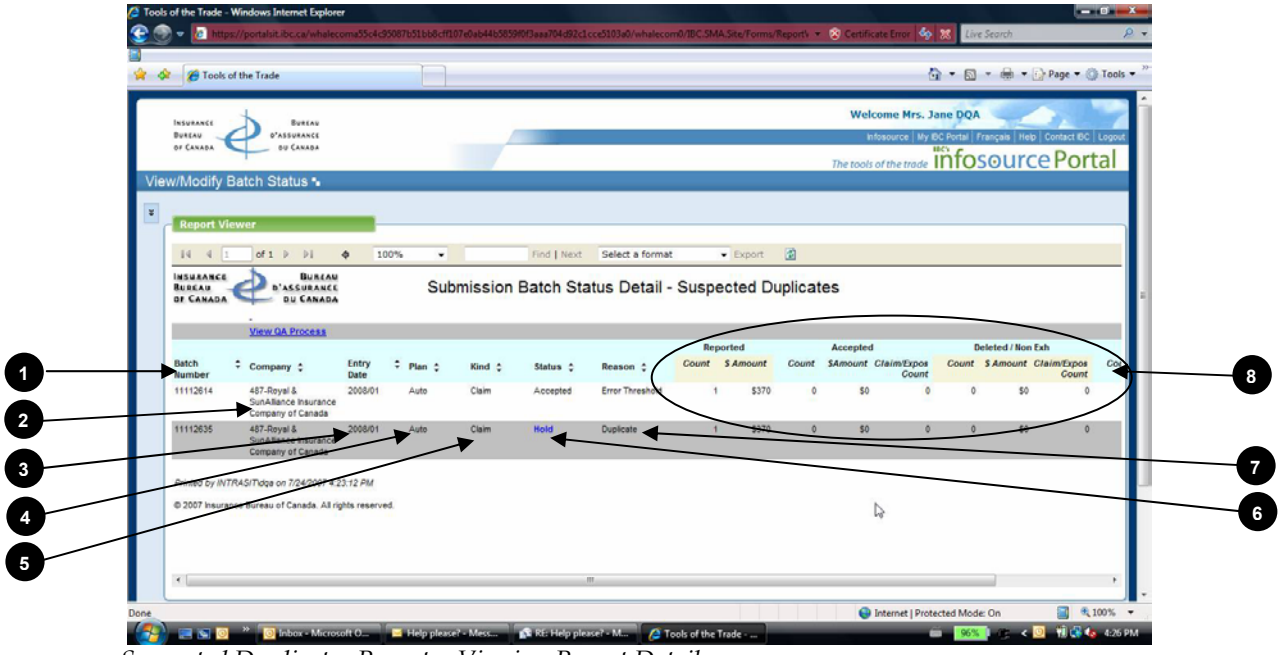
See Also:
Navigating within a report
Navigating back to a parent report
Changing the report display
Searching within a report
Exporting and printing a report
Refreshing a report

Viewing Report Details – Suspected Duplicates Report

After you select a Batch Number from the Submission Batch Status List, and the Status of that batch is "Hold" and the Reason is "Suspected Duplicate," the Suspected Duplicates report will be displayed. The Suspected Duplicates report shows further information regarding the RU Batch you have selected, along with the associated duplicate RU Batches.

NOTE: *If the status of the associated duplicate RU Batch is modified after the "Hold" status has been assigned to it, then the RU Batch that is on "Hold" will be reported without any associated duplicate RU Batches.*

Table 19 describes the report content that you find numbered in the screenshot below.



Suspected Duplicates Report – Viewing Report Details

Table 19: Suspected Duplicates Report – Viewing Report Details

No.	Content	Description	Links
1	Batch Number	The unique Batch Number assigned by IBC to the Reporting Unit within the submission file. As selected	Display only
2	Company	As selected	Display only
3	Entry Date	As selected	Display only
4	Plan	As selected	Display only
5	Kind	As selected	Display only
6	Status	The current status of the RU Batch. Example values are: • **Accepted** • **Hold**	Display only
7	Reason	The reason that the RU Batch is or was previously on "Hold". Example values are: • **Duplicate** • **Error Threshold**	Display only
8	REPORTED Count and Amount	The total Record Count and dollar amount of all the reported transactions	Display only
	ACCEPTED Count, $Amount and Exposure/ Claim Count	The total Record Count, dollar amount and Exposure/Claim Count of all the reported transactions that are found to be error free	Display only
	DELETED/NON-EXHIBIT Count, $Amount and Exposure/ Claim Count	The total Record Count, dollar amount and Exposure/Claim Count of all the reported transactions that are dropped	Display only

No.	Content	Description	Links
	ERROR Count, $Amount and Exposure/ Claim Count	The total Record Count, dollar amount and Exposure/Claim Count of all the reported transactions that are found to be in error	Display only

See Also:
Navigating within a report
Navigating back to a parent report
Changing the report display
Searching within a report
Exporting and printing a report
Refreshing a report

3. ERROR ANALYSIS

**Error Analysis reports are to be included in final release of application and documentation.

4. TEST ANALYSIS

**Test Analysis reports are to be included in final release of the application and documentation.

5. ERROR CORRECTION

Error Correction Overview

The Error Correction facility allows reporting companies to view records that are in error and to correct them on-line. Corrected error records will be fully edited and will be updated to IBC's database. You can also choose to update partially corrected error records to IBC's database (i.e., records that still contain errors).

If you have not completed your changes and wish to retrieve the error record and complete the changes at a later time, you can save it as a work in progress (WIP).

All data transmitted via Error Correction is completely secure and only authorized insurer personnel can access data belonging to their particular company.

Error Correction currently supports Plan 8 (Automobile) and Plan 9 (Facility Association). Only records containing one or more errors that are from accepted production batches will be available for correction.

After successfully logging into the Submission Management application, you can access the Error Correction facility via the Main Menu. Once you select Error Correction, the Error Correction Search criteria screen will be displayed.

To correct errors, you will simply follow these steps:

1. Input the desired search criteria.
2. Select from the search results (when using "Search by Batch").
3. Correct the transaction.
4. Submit or save the record.

For access to the Error Correction facility, please see Obtaining Access.

5.1. Error Correction Process

In order to correct errors using the Error Correction facility, you must follow the steps below.

1. Enter the criteria you wish to search for in the Error Correction Search screen. For more information, please see 5.2 Entering Search Criteria.

2. View the search results and select a batch from the results list. (This is only applicable if you are using the "Search by Batch" option.) For more information, please see 5.3 Viewing and Selecting from Search Results.

3. View the error transaction and make the appropriate modifications. You can make corrections to fields either by changing the value in the field itself or making changes in the expanded Details box. For more information, please see 5.4 Viewing and Correcting Error Transactions.

4. Click the SUBMIT button to re-edit and update the transaction in the database, or click the WIP button to save your changes without submitting them.

   If a corrected record is submitted but still contains errors, that record will be redisplayed with these errors. You will also see a message indicating that the record still contains errors and the database has not been updated. You will then have an additional a command button available, labelled ACCEPT WITH ERRORS. Clicking the ACCEPT WITH ERRORS button will resubmit the transaction and update the transaction in the database, regardless of the existing errors.

IMPORTANT NOTE: *Avoid changing data in a field that is not highlighted. Changing unhighlighted data may cause additional errors.*

5.2. Entering Search Criteria

The Error Correction Search screen allows you to select error records based on specific criteria.

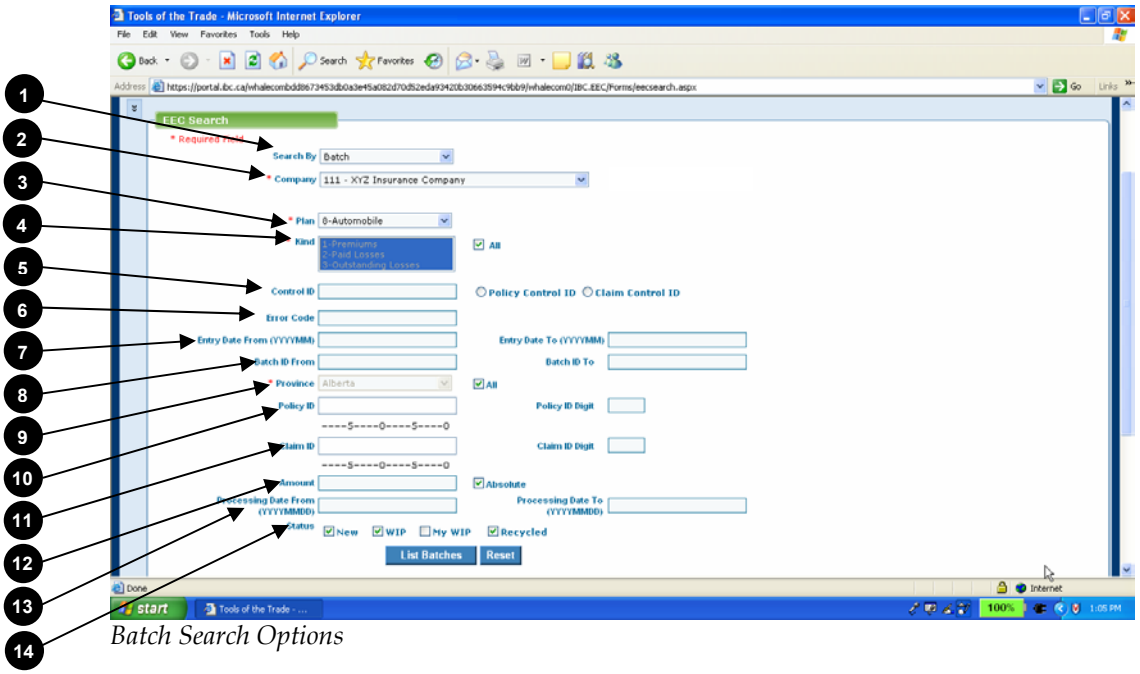
First, select from one of the two available search options. You may search,

1. by Batch to retrieve multiple records; or
2. by Single Record.

Batch Search

Selecting the "by Batch" search option allows you to choose from an extensive list of search criteria. You can customize your search results by expanding or narrowing the selection criteria and then clicking the LIST BATCHES button.

Table 20 describes the criteria and selection options that you find numbered in the screenshot below.



Batch Search Options

Table 20: Batch Search Options

No.	Criteria	Description	Selection options
1	Search By	The options to "Search by Batch" or "Search by Single Record"	- Default setting is to "Search by Batch"
2	Company (mandatory)	List of available reporting companies, based on your profile	- Defaults to the first company in the list - Only one company number can be selected
3	Plan (mandatory)	List of available Plans	- Defaults to the first Plan in the list - Only one Plan can be selected
4	Kind (mandatory)	List of available Kinds	- Defaults to "All" (i.e., the "All" checkbox is checked) - One or more Kinds can be selected from the list
5	Policy/Claim Control ID	Select and enter the "Policy Control ID" or the "Claim Control ID". May restrict options based on the selected Kind values. Kinds 2 or 3. *NOTE: "Branch" is generally reported in this field*	- No default
6	Error Code	A single Error Code in one of the acceptable formats: (e.g. U304C) **Positions 1-5** (where n is 0-9) AnnnV, AnnnC, FnnnV, FnnnC, UnnnV, UnnnC, Bnnnn, Cnnnn, or Dnnnn **Position 6** is the value "x" where applicable (e.g. U414Vx)	- No default

No.	Criteria	Description	Selection options
7	Entry Date	"From" and "To" Entry Dates	- No default - Enter the numeric representation of the year and month. If the "To" date is left blank, all Entry Dates that fall on or after the "From" date will be included
8	Batch ID	"From" and "To" Batch IDs. The Batch ID is a unique number IBC assigns to each RU within a file.	- No default - If the "To" field is left blank, all Batch ID numbers greater than or equal to the "From" Batch ID will be included.
9	Province (mandatory)	List of Canadian provinces and territories, as well as an "OT-Other" option. ("OT-Other" includes any transaction reported with an invalid statistical territory code)	- Defaults to "All" (i.e., "All" checkbox is checked) - A specific province can be selected from the dropdown list by clearing the "All" checkbox. (Note that only one province can be selected)
10	Policy ID/ Policy ID Digit	The Policy ID and Policy ID Digit as reported on the original record	- No default
11	Claim ID/ Claim ID Digit	The Claim ID and Claim ID Digit as reported on the original record	- No default

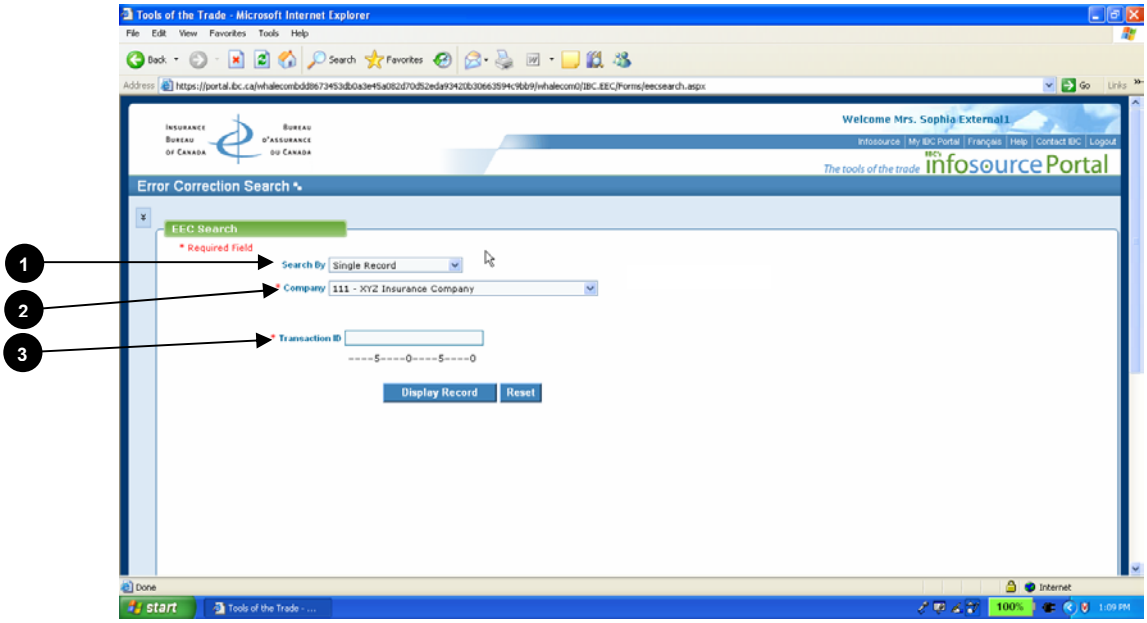
No.	Criteria	Description	Selection options
12	Amount	The minimum total transaction amount. If a negative amount is entered, the system will search for an equal or higher negative value. Checking the "Absolute" checkbox makes the search disregard any negative sign. For example, if "5000" is entered in the Amount field, the system will search for records where the total premium or claims amount is greater than +4999 or less than -4999.	- Defaults to "Absolute: (i.e., the "Absolute" checkbox is checked) - Enter negative amounts with a leading minus sign, for example: "-400."
13	Processing Date	"From" and "To" Processing Dates as reported on the original record. This is also known as the UITS Processing Date.	- No default - Enter the numeric representation of the year, month, and day - If the "To" date is left blank, all Entry Dates on or after the start date will be included
14	Status (mandatory)	Select one or more of four checkboxes: - **New** (original records that have not yet been corrected or modified) - **WIP** (records previously saved) - **My WIP** (records previously saved by you) - **Recycled** (records that were partially corrected and updated with errors)	- Defaults to "New," "WIP" and "Recycled" (i.e., the "New," "WIP" and "Recycled" checkboxes are checked) - One or more Statuses can be selected

Click the RESET button to return all criteria fields to their default values.

Single Record Search

The Single Record Search enables you to select a single transaction based on the unique Transaction ID number that IBC assigns to each transaction.

Table 21 describes the Single Record Search criteria and selection options you find numbered in the screenshot below.



Single Record Search

Table 21: Single Record Search

No.	Criteria	Description	Selection options
1	Search By	Options to "Search by Batch" or "Search by Single Record"	- Defaults to "by Batch"
2	Company (mandatory)	List of available reporting companies based on your profile	- Defaults to the first company in the list - Only one company number can be selected
3	Transaction ID (mandatory)	The Transaction ID is the unique number IBC assigns to each transaction record	- No default

Click the RESET button to return all criteria fields to their default values.

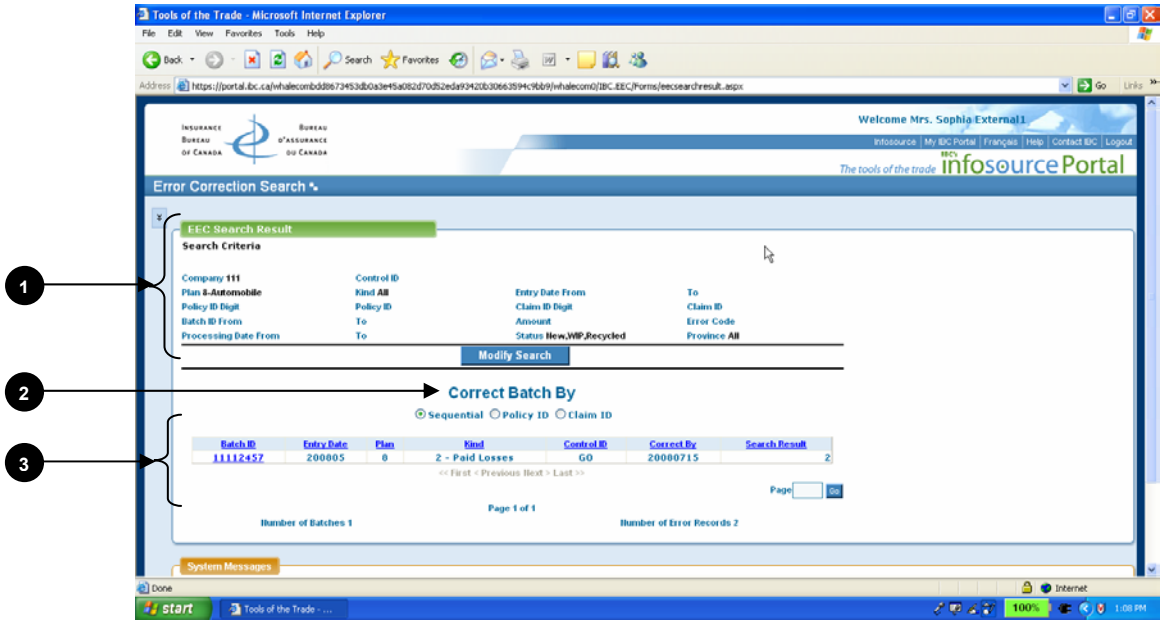
5.3. Viewing and Selecting from Search Results

After you submit the "Search by Batch" information, the Search Result screen will be displayed. This report provides a summary of all RU Batches containing error records that meet your search criteria. Only records containing one or more errors that are from accepted production batches will be available for correction.

The Search Result screen is segmented into the following areas (the numbers correspond to the elements of the Search Result report you see numbered in the screenshot below):

1 Search Criteria Information	This part of the screen displays a summary of the selection criteria for your reference.
2 Correct Batch By	In this part of the screen you can choose to request the sequence in which errors are presented.
3 Batch Results Report	This part of the screen displays a summary report containing all batches that meet the selection criteria.

At any point, click the MODIFY SEARCH button to return to the Error Correction Search screen.



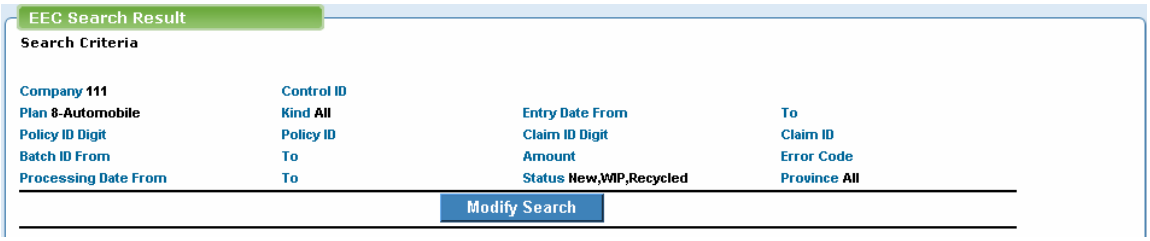
Error Correction Search Screen

A more detailed description of each of these Search Result screen areas is provided below.

Search Criteria Information

A summary of the selection criteria is displayed in the top portion of the screen for your reference. You can see an example of the Search Criteria information in the figure below.

At any point, click the MODIFY SEARCH button to return to the Error Correction Search screen.



Example Search Criteria Information

Correct Batch By

By default, the Error Transaction screen will display the records in the order in which they were received by IBC. The Correct Batch By option enables users to alternately order records either by Policy ID or Claim ID. By using this feature, you can view and correct all of the outstanding errors relating to a particular policy or claim, as a group. Efficiency is greatly improved because you only need to refer to the same Policy or Claim file information on your system once.

To sequence either by Policy ID or Claim ID, click on the appropriate radio button.

Batch Results Report

The Batch Results report displays a summary of all the RU Batches containing error records that met the criteria you selected. It also allows you to select an RU Batch to correct. Note that any time this report is redisplayed, the information will be refreshed and will include any corrections you have already made.

When the report is initially displayed, it will be sequenced by Batch ID. However, you can change the order of the batches by clicking any of the underlined column headings, e.g., a column that displays records in ascending order will switch to display records in descending order when you click on the column heading. A second click on a column heading will reverse the sequence.

Any batch can be selected as the starting point for displaying the error records. After all records in that batch have been processed, the first record of the next batch on the list will be displayed.

Navigate through the pages of the report by entering a specific page number and clicking the GO button, or by selecting the "<<First," "<Previous," "Next>" or "Last>>" buttons.

Table 22 describes the Batch Results report content that you find labelled in the figure below.

Batch Results

Table 22: Batch Results Report

No.	Content	Description	Links
1	Batch ID	The unique Batch ID assigned by IBC to the Reporting Unit within the submission file	The Batch ID listed in the search results links to the Error Correction screen where you can make corrections
2	Entry Date	As reported	Display only
3	Plan	As reported	Display only

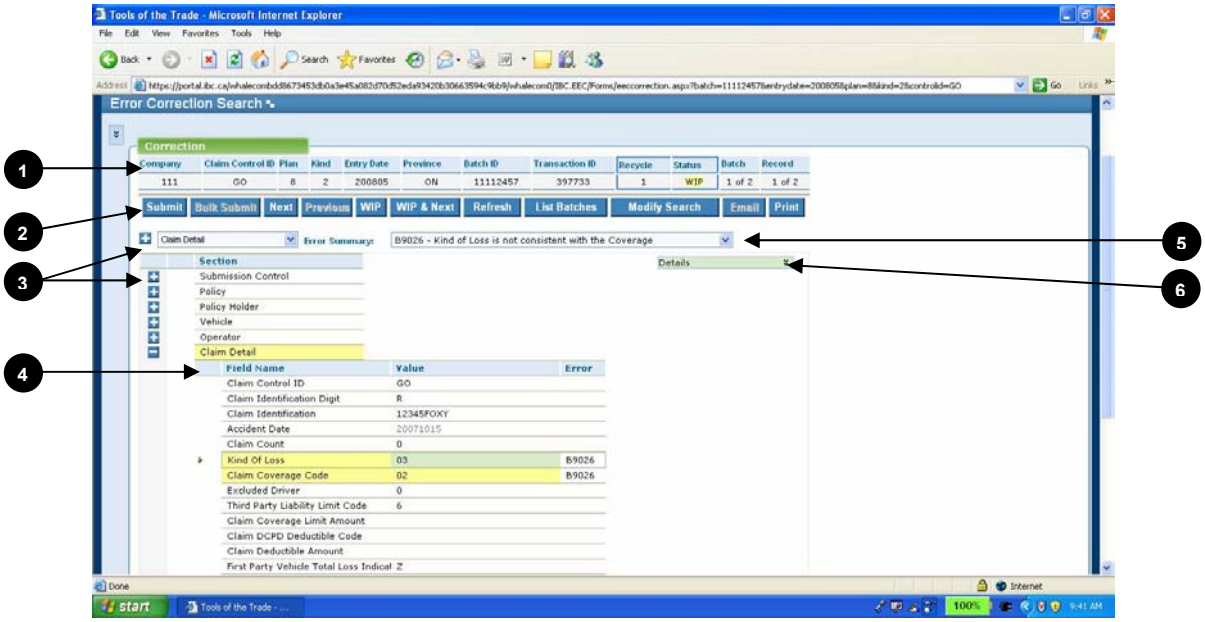
No.	Content	Description	Links
4	Kind	As reported	Display only
5	Control ID	As reported	Display only
6	Correct By	The date by which the errors should be corrected before late fees will be applied	Display only
7	Search Result	The current number of error transactions in the batch that met the selection criteria. This number is updated as corrections are made.	Display only

5.4. Viewing and Correcting Error Transactions

After you select a batch to work with, or you submit a Single Record Search, the Error Correction screen will be displayed. This is the screen where you will make corrections to error transactions.

The Error Correction screen is segmented into the following areas (the numbers correspond to the elements of the Error Correction screen that you see numbered in the screenshot below):

1 Key and Status Information	The record key information is displayed here, along with status information, for your reference.
2 Command buttons	These buttons allow you to perform specific functions, such as submitting a correction or navigating to other error records.
3 Sections	The transaction is broken down into the same sections that are described in the Automobile Statistical Plan (ASP) Manual.
4 Fields	Each section contains a list of fields that correspond to that particular section. The fields are identified by the same names used in the ASP Manual.
5 Error Summary	This drop-down list displays the current list of the errors in the transaction.
6 Details	This expandable/collapsible box provides further information regarding the error codes for the selected field and can be used to select or enter correction data.

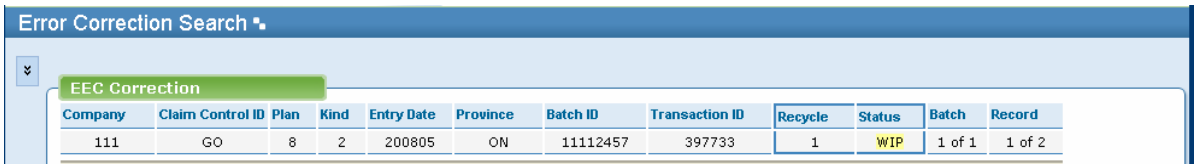


Error Correction Screen

A more detailed description of each of these Search Result screen areas is provided below.

Key and Status Information

For easy reference, information about the **record key and status** is displayed in the top portion of the screen. This information cannot be changed. In order to recall this specific error transaction, choose Single Record Search from the Selection Criteria screen, select the company and enter the Transaction ID. The system will display that particular transaction and you can then make changes.



Key and Status Information

The **Recycle** count lists the number of times that the error has been submitted to IBC. The first time that an error is posted for correction, the Recycle count is shown as ”0.” This count increases by one each time you submit a correction and choose to update the database even though the record still has errors.

The **Status** column indicates the stage of the error. The possible error statuses are as follows:

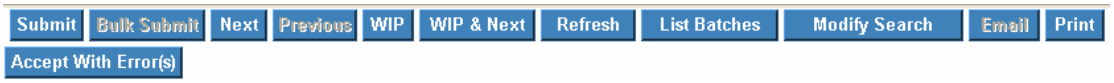
- New (no change has been made to the transaction);
- WIP (the record was previously saved with changes without being submitted); or
- Recycled (the record has been submitted but the transaction is still in error).

The **Batch** column shows the total number of batches retrieved based on the criteria you selected. It also indicates the batch you are in, in relation to the total number of batches (e.g., 1 of 1).

The **Policy/Claim** column (not shown in the screenshot above) is displayed only when the "Correct Batch By" option has been set to either Policy or Claim ID. This indicator lets you know how many other error transactions have been selected for the same Policy ID or Claim ID.

The **Record** column lists the current and total number of records contained in the batch. When correcting records by either Policy ID or Claim ID, the record count will display the number of unique Policy IDs or Claim IDs contained in the batch instead.

Command Buttons



Error Correction Screen - Command Buttons

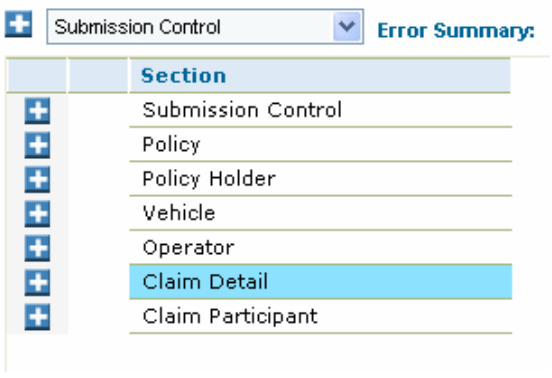
Table 23: Error Correction Screen – Command Buttons

Command Button	Description
Submit	After correcting a transaction, you can submit it for re-editing. A complete edit will be performed immediately. If there are no resulting errors, the transaction will be updated in the database and the next error transaction will be displayed. If there are resulting errors, the record will be redisplayed and the error information will reflect the errors still remaining. (See Accept with Errors, below.)
Bulk Submit	**Bulk Submit is to be included in final release of the application and documentation.
Next	This button allows you to skip the current record and move to the next error transaction record. Any unsaved changes to the current record will be discarded.
Previous	This button takes you back to the previous error transaction, skipping any transactions that have already been updated in the database. Any unsaved changes to the current record will be discarded.
WIP	WIP (Work in Progress) saves changes you have made to a record without actually submitting the transaction to IBC to be edited. The saved record will remain on your screen for further review.
WIP & Next	WIP & Next saves changes you have made to a record without actually submitting the transaction, and then skips to the next record for correction.

Refresh	Clicking this button will discard any unsaved changes and keep the record on your screen for further review.
List Batches	Use this button to return to the Search Results screen, which will display an up-to-date summary reflecting any changes that you have submitted. Any unsaved changes will be lost.
Modify Search	Use this button to return to the Search Criteria screen, where you can modify and resubmit the search criteria. Any unsaved changes will be lost.
Email	Sets up a message that will be sent to the All Industry support team.
Print	Creates a PDF version of the transaction for printing.
Accept With Error(s)	This button will only be available when you have submitted a record that is still in error. Clicking this button will resubmit the transaction and update the transaction in the database regardless of the existing errors.

Sections

The error transaction is organized in the same sections contained in the transactions you submit to IBC. By default, when you first see this screen, the section(s) that contain the first error will be expanded.



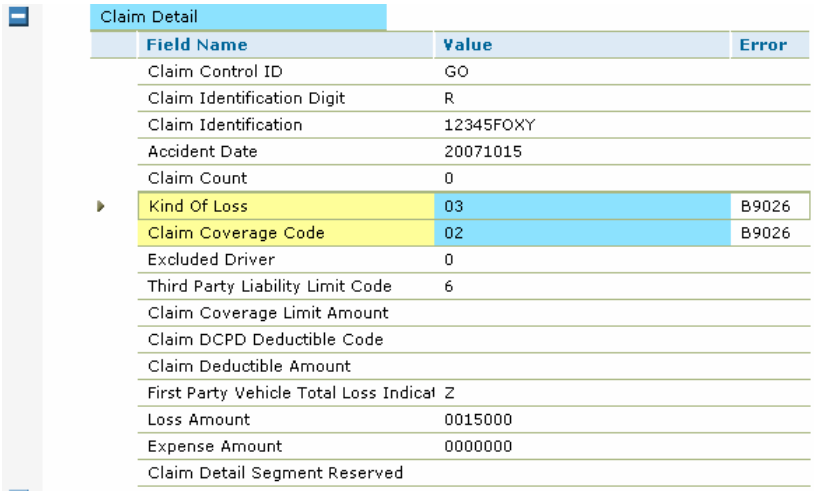
Each section contains all of the fields that belong to that group. You can expand the sections by selecting them from the drop-down list or by clicking the icon next to the section name. Alternately, you can expand all sections by clicking on the icon next to the drop-down list. The sections can be collapsed again by clicking the icon.

Fields

When you expand a section you will see all of the fields that belong to that particular section. The fields are identified by the same names used in the ASP Manual and Edit Rules Documentation (ERD). The fields are also organized in the same order in which they are reported on the 600-byte ASP format.

All fields that are involved in error(s) are highlighted (see the figure below).

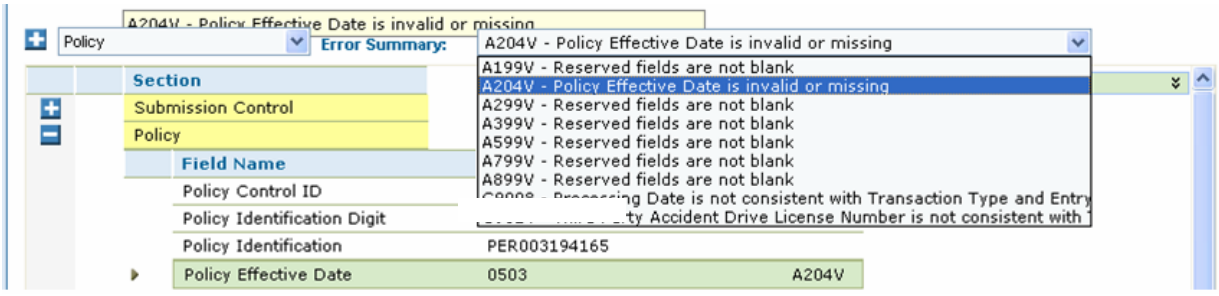
The fields section displays the Field Name, the reported value and any errors involving that particular field.



Error Correction - Fields

Error Summary

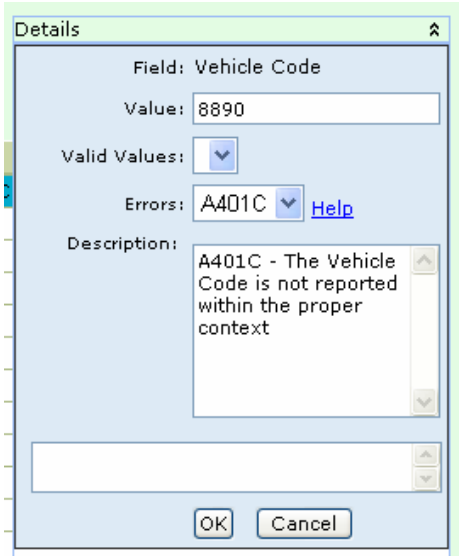
The Error Summary drop-down list allows you to select a specific error code and go directly to the fields associated with that error. The Error Summary drop-down list contains all of the errors that currently exist for that transaction. Once you select an error code, the affected section(s) will be automatically expanded.


Policy
Error Summary:
A204V - Policy Effective Date is invalid or missing
A199V - Reserved fields are not blank
A204V - Policy Effective Date is invalid or missing
A299V - Reserved fields are not blank
A399V - Reserved fields are not blank
A599V - Reserved fields are not blank
A799V - Reserved fields are not blank
A899V - Reserved fields are not blank
Section
Submission Control
Policy
Field Name
Policy Control ID
Policy Identification Digit
Policy Identification
PER003194165
Policy Effective Date
0503
A204V

Error Summary

Details

Expand the Details panel to see further information about the error(s) in the field you have selected.



You can make corrections in the Details panel by updating the Value or by selecting the appropriate value from the Valid Values list and then clicking the OK button. Note that the Valid Values list is only available for fields that have an associated list of code values.

Clicking the CANCEL button will discard any change that you have made.

The panel content is described in table 24.

Table 24: Details Panel

Content	Description
Details	Click to open or close the details panel.
Field	The name of the selected field is displayed here.
Value	The current value or any changes you make will be displayed here.
Valid Values	This drop-down list contains the possible valid values. Note that the Valid Values list is only available for fields that have an associated list of code values.
Errors	This is a drop-down list containing all errors associated with that field. Click on an error code to see the description.
Help	Click this link to view the corresponding Edit Rules Documentation, which will provide complete details regarding the error code.
Description	Here you will find a description of the error code.
Message	Messages will appear here if you take an inappropriate action, such as switching to a new field before saving changes.

6. CONTACTING IBC FOR ALL INDUSTRY TEST SUPPORT

If you have any questions or require additional support after reviewing the orientation material, please contact ASP2008@ibc.ca and include in your e-mail:

→ A short description of your question/request, indicating whether it relates to:
- technical connectivity
- ASP or Edit Rules specification
- on-line application usability; and/or
- other

→ Your name and telephone number, and your company name and reporting company number

A member of IBC's All-Industry Test Support Team will respond to your request in a timely manner via e-mail or phone.

GLOSSARY

**Glossary is to be included in final release of documentation.

APPENDIX A – FILE REJECT DESCRIPTIONS

The following are the descriptions of the Reject Reasons for a rejected submission file. These Reject Reasons can be viewed in the Submission Status Detail Report.

Reject Reason Text	Reject Reason Description
Empty file	A file must contain 1 or more records.
Invalid company grouping	All company numbers that are reported within a file must belong to the same group (i.e. must all have the same Parent Client ID).
Invalid file name	Data submitted to IBC must follow the set file naming convention. Please see the Data Submission Requirements Manual for complete details.
Invalid record length	Files that are named with the prefixes of PST, TST, PAUTOR, or TAUTOR must not contain records that are more than 500 bytes in length. Files that are named with the prefix of PAUTO or TAUTO must not contain records that are more than 600 bytes in length.
New Auto Format Submission Check	Files that are named with the prefix of PAUTO or TAUTO that are reported prior to April 1, 2008 can only contain data with the following characteristics: i. All Entry Dates must be >= November 2007 ii. If Entry Date is Nov or Dec 2007, then Policy Effective Date must be >= Jan 2008 iii. If Entry Date is >= Jan 2008, then any Policy Effective Date is valid.

Reject Reason Text	Reject Reason Description
Old Auto Format Submission Check	Files that are named with the prefix of PST or TST that are reported on or after April 1, 2008 can only contain data with the following characteristics: i. All Entry Dates must be < January 2008 ii. All Policy Effective Dates must be < January 2008
Run-off Submission Check	Files that are named with the prefix of PAUTOR or TAUTOR can only contain data with the following characteristics: i. File must only contain claims (kinds 2 and 3) ii. File must only contain data with Entry Dates >= Jan 2008 and Policy Effective Dates < Jan 2008 iii. The company must have the status of run-off.

APPENDIX B – RU BATCH REJECT DESCRIPTIONS

The following are the descriptions of the Reject Reasons for a rejected RU Batch. These Reject Reasons can be viewed in the Batch Detail Report and under View Batch Status.

NOTE: The Reporting Unit fields will be displayed with asterisks (exception is Entry Date which will display 9999/99) for the following conditions:

- Reporting Company is not numeric
- Entry Date Year is not numeric or is less than 1930
- Entry Date Month is not 01-12
- Plan is not '8' or '9'
- Kind is not '1', '2', or '3'

-

Reject Reason Text	Reject Reason Description
Improper header format	The header records within the submission file must be formatted as outlined in the Data Submission Requirements Manual.
Improper reporting unit	RU Batches must meet the following Reporting Unit characteristics: i. Must be a valid combination of Reporting Company, Entry Date, Plan, and Kind. ii. On premiums the Entry Date cannot be greater than the system date plus two months. (This does not apply to test submissions.) iii. On claims the Entry Date cannot be greater than the system date. (This does not apply to test submissions.)
Improper trailer format	The trailer records within the submission file must be formatted as outlined in the Data Submission Requirements Manual.
Invalid outstanding loss entry date.	Automobile (Plan 8) Outstanding Losses (Kind 3) can only be reported for the Entry Months of March, June, September, and December.

Reject Reason Text	Reject Reason Description
Missing header	Each Reporting Unit (RU) that is reported within a submission file must have a corresponding header record as outlined in the Data Submission Requirements Manual.
Missing trailer	Each Reporting Unit (RU) that is reported within a submission file must have a corresponding trailer record as outlined in the Data Submission Requirements Manual.
Out of balance	The Trailer amount reported on the Trailer record must be within plus or minus 1% of the sum of the detail records.

APPENDIX C – HOLD/DELETE REASON DESCRIPTIONS

The following are the descriptions of the Hold and Delete Reasons for an RU Batch that has the status of Hold or Delete. These reasons can be viewed in the Submission Status Detail Report and under View Batch Status.

Reject Reason Text	Reject Reason Description
Exceeded error tolerance	An RU Batch will be put on "HOLD" when the number of records in error is within a predefined range for the number of transactions in the RU Batch.
Exceeded high end error tolerance	An RU Batch will be marked as "DELETED" when the number of records in error is within a predefined range for the number of transactions in the RU Batch.
Suspected duplicate	An RU Batch will be put on "HOLD" if a batch with the same RU, counts, and amounts, with the status of 'Accepted' or 'Partially Accepted', and the Run-Type of 'Production' has already been processed.
The entry date reported is older than 4 months.	An RU Batch will be placed on "HOLD" if reported more than 4 months following the Entry Date.

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